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 diverse range of courses and programs, is facing challenges in managing its growing admissions process, student inquiries, and consulting services. The current manual processes have become inefficient, leading to delays and a suboptimal experience for both prospective students and admissions staff. To address these issues, the institute is implementing Salesforce CRM to streamline and automate key aspects of the admissions process. This project involves leveraging the expertise of Salesforce Administrators and Developers to create a robust system that enhances both internal workflows and the overall experience for students and staff. The primary goal is to provide a seamless and transparent journey for prospective students—from their initial inquiry through to final admission—while enabling the admissions team to efficiently manage applications and inquiries. Automation and real-time tracking will be key features, ensuring that all interactions are handled promptly and effectively. Additionally, the project aims to improve the institute's consulting services by integrating Salesforce CRM with existing systems, allowing for better communication between students and consultants, and more efficient case management. The new system will provide a centralized platform for the admissions team, ensuring that every prospective student receives personalized attention and support. The success of this initiative will be measured by improvements in process efficiency, reduced response times, and higher satisfaction levels among students and staff. By adopting Salesforce CRM, EduConsultPro Institute is not only resolving its current challenges but also positioning itself for future growth and continued excellence in an increasingly digital world.

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INTRODUCTION

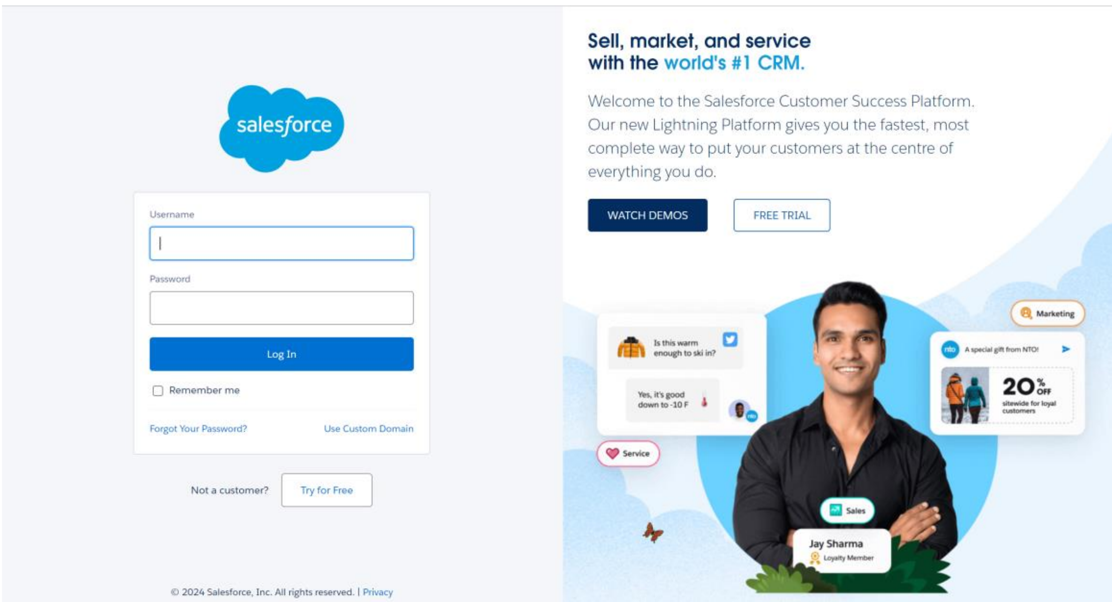
EduConsultPro Institute has established itself as a leading educational institution, offering a diverse range of courses and programs that attract a large number of prospective students each year. With this growth comes the increasing complexity of managing the admissions process, handling student inquiries, and providing expert consulting services. The institute's existing manual systems, while functional, have become increasingly strained under the pressure of this growing demand. This has led to inefficiencies, delayed response times, and challenges in maintaining the high level of service that EduConsultPro is known for.

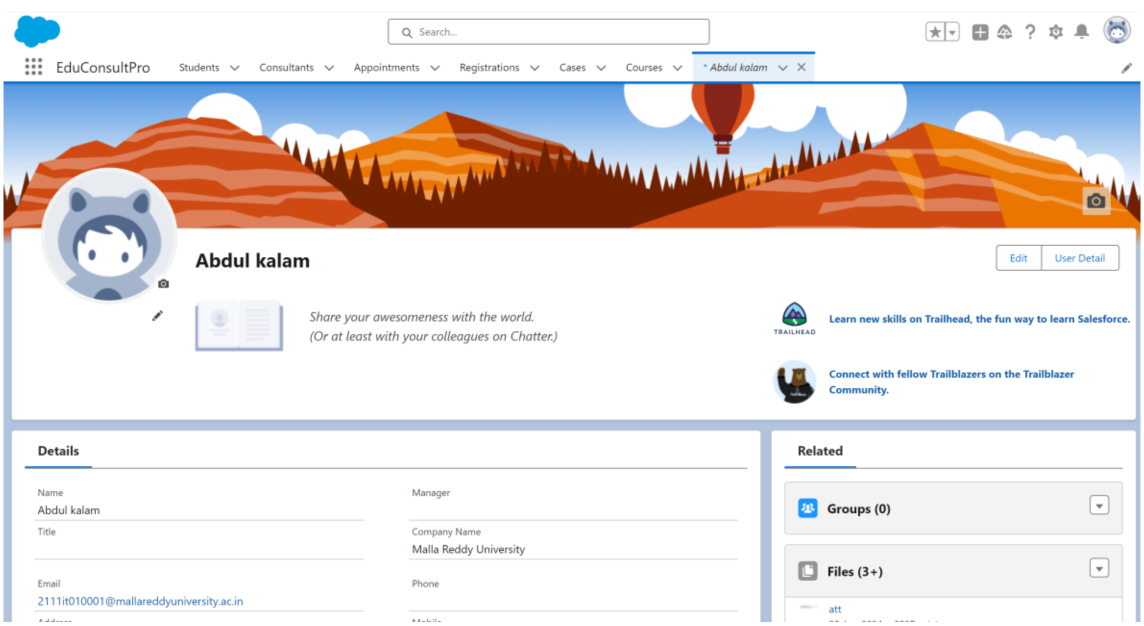
Recognizing the need for a more efficient and scalable solution, EduConsultPro Institute has decided to implement Salesforce CRM. This decision marks a significant step in the institute's digital transformation journey, aimed at enhancing the efficiency and effectiveness of its operations. Salesforce CRM will enable the institute to automate key aspects of the admissions process, providing a more streamlined and transparent experience for prospective students, from their initial inquiry to final admission. Additionally, the system will empower the admissions staff to manage applications and student inquiries more effectively, reducing manual workloads and minimizing the potential for errors.

The integration of Salesforce CRM is not only a response to the current operational challenges but also a proactive measure to future-proof the institute's processes. By adopting this advanced technology, EduConsultPro Institute is positioning itself to better serve its growing student body, ensuring that it can continue to provide a high level of service while also enhancing the overall experience for both students and staff. This introduction sets the stage for the detailed exploration of the Salesforce CRM implementation project, highlighting its objectives, scope, and expected impact on the institute's operations.

TASK 1: SALES FORCE ACCOUNT CREATION

1. Go to - https://developer.salesforce.com/signup .
2. On the signup form, enter the required details.
3. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins.

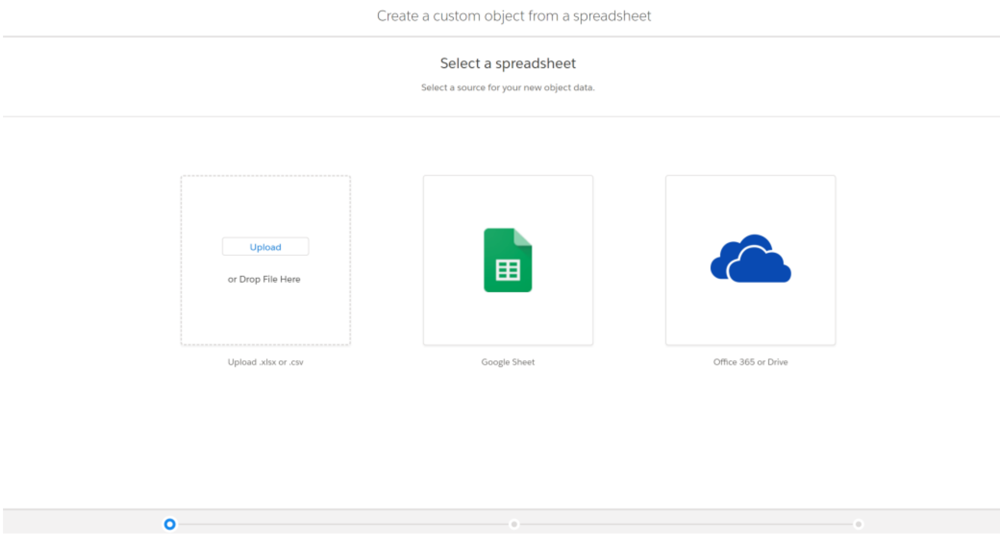




TASK 2: OBJECT CREATION FROM SPREADSHEET

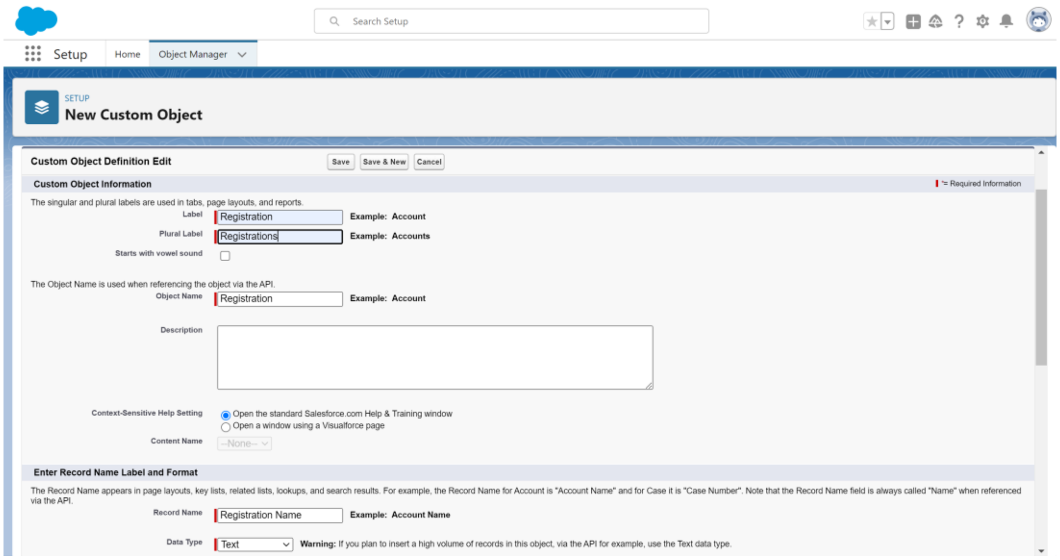
a) Create Course Object

1. Download spreadsheet from the skillwallet.
2. From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object from Spreadsheet.
3. Upload the file.
4. Enter the fields and click save.
5. Do the same for the other 3 objects also Consultant, Student, Appointment.



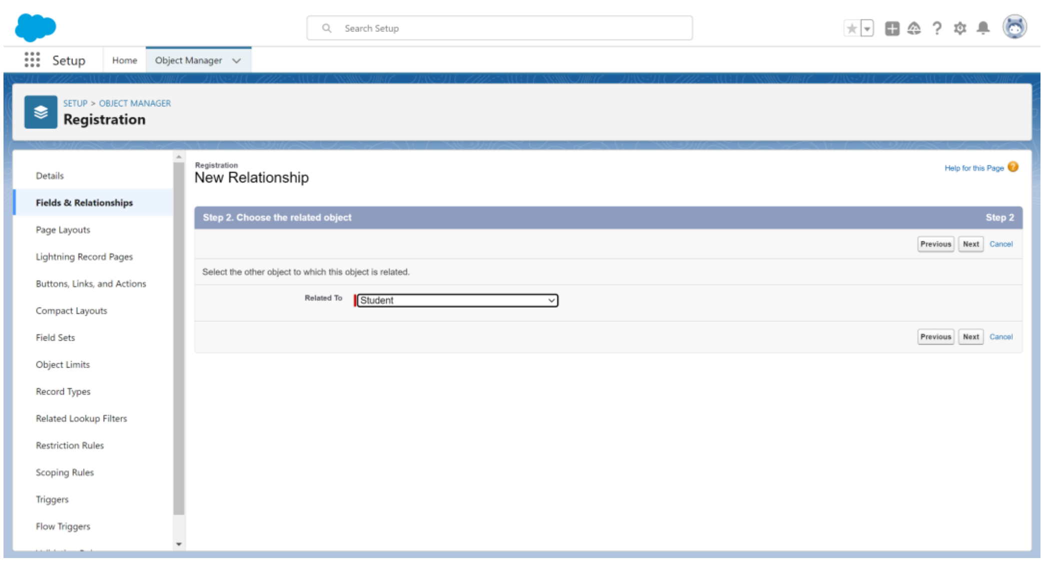
b) Create the Registration Object

1. From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.
2. Enter the label name >> Registration
3. Plural label name >> Registrations
4. Cilck save.



c) Create Lookup Relationship Between 'Appointment' and 'Student'

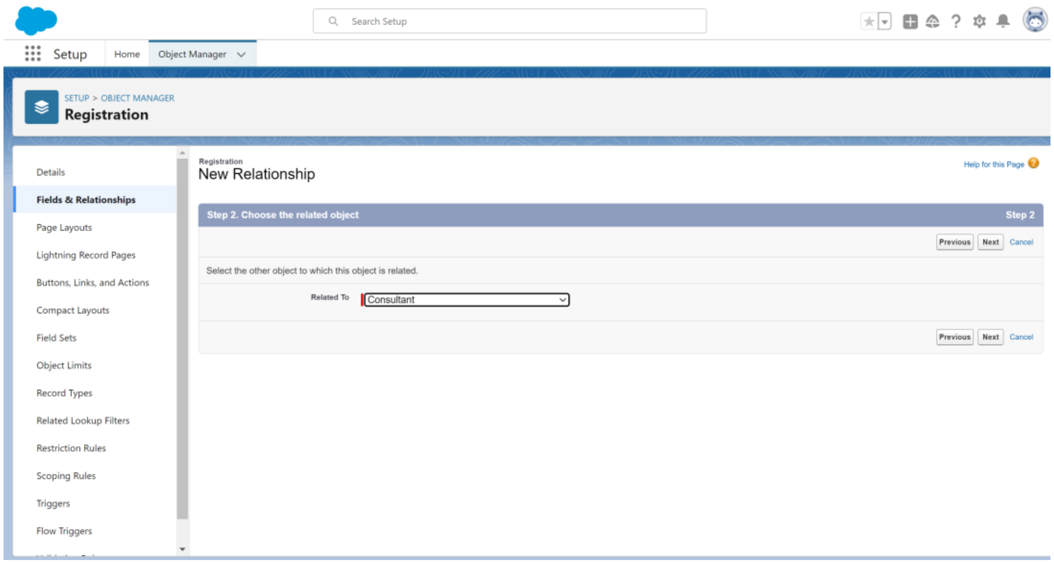
1. Object Manager >> Appointment >> Fields & Relationships >> New.
2. Field Type: Lookup Relationship.
3. Related To: Student
4. Field Label: Student
5. Click save.



d) Create Lookup Relationship Between 'Appointment' and 'Consultant'

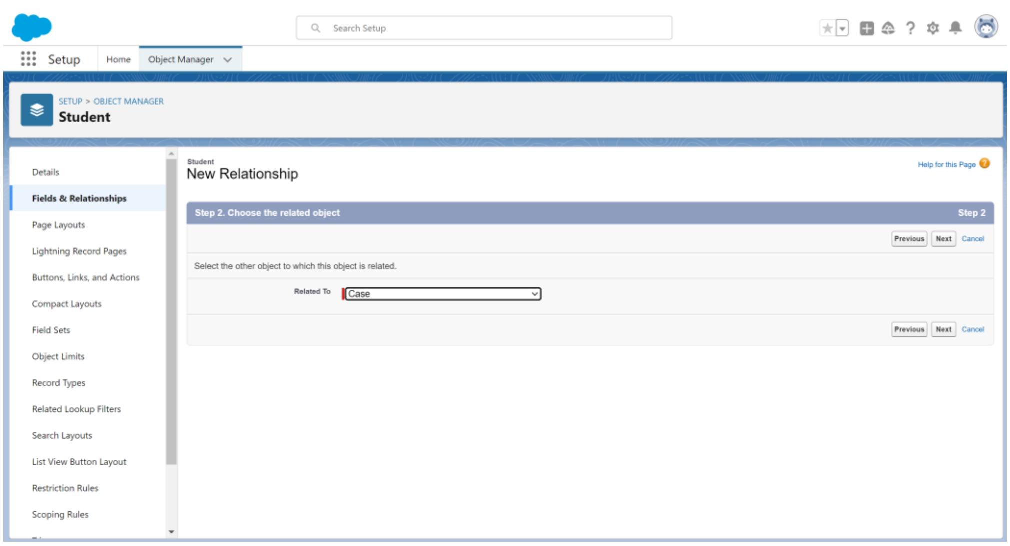
1. Object Manager >> Appointment >> Fields & Relationships >> New.
2. Field Type: Lookup Relationship.
3. Related To: Consultant
4. Field Label: Consultant

5. Click save.



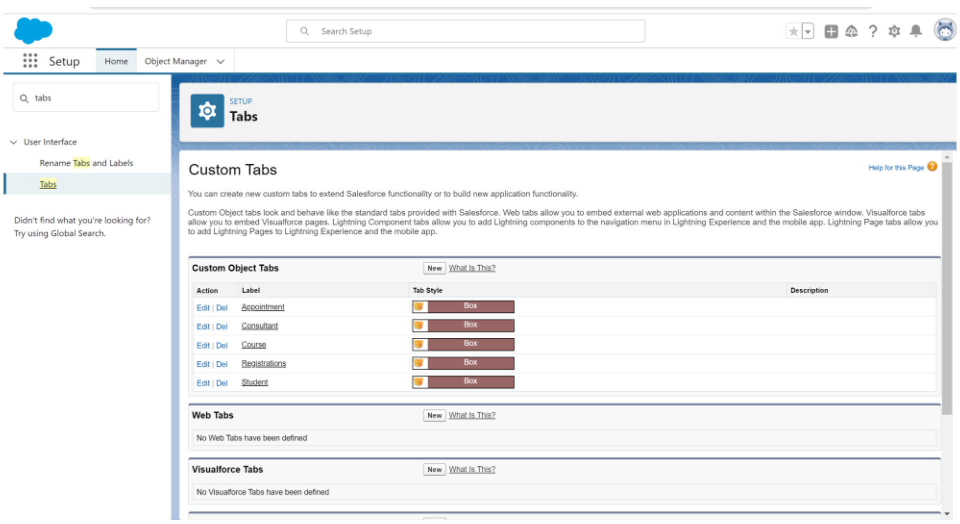
e) Create Lookup Relationship Between 'Student' and 'Case'

1. Object Manager >> Appointment >> Fields & Relationships >> New.
2. Field Type: Lookup Relationship.
3. Related To: Case
4. Field Label: case
5. Click save.



TASK 3: TABS

1. Setup >> Tabs >> New.
2. Under the Custom Object Tabs section, click New.
3. Object: Appointment
   Consultant
   Course
   Registrations
   Student
4. Select a Tab Style.
5. Click save.



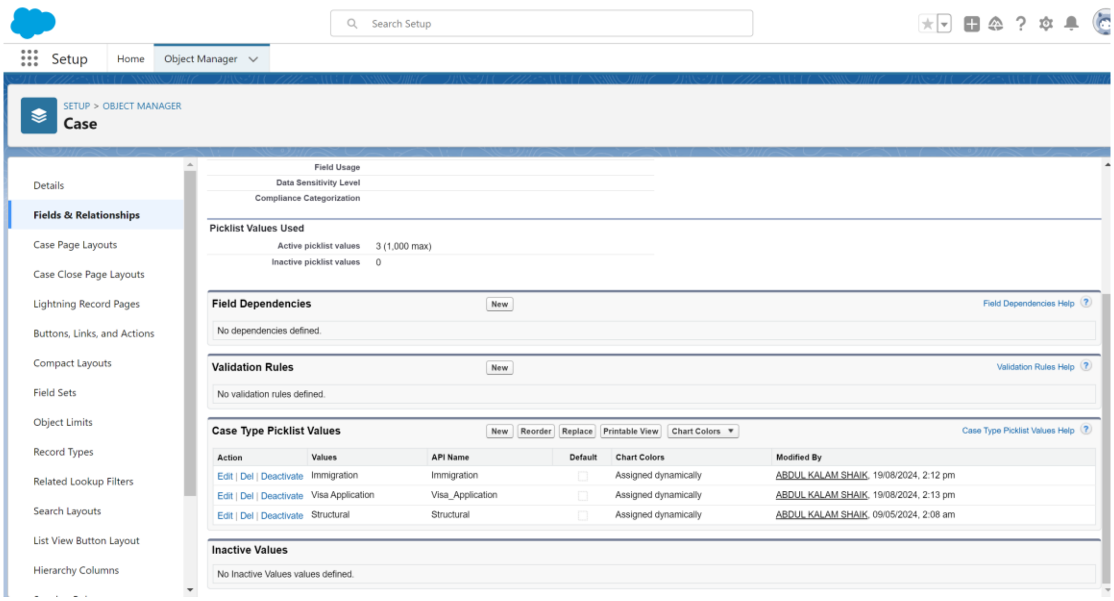
TASK 4: CONFIGURE THE CASE OBJECT

a) Edit the "Type" Field

1. In the Quick Find box, type Object Manager and click on it.
2. Search for and select the Case object from the list.
3. Find the Type field in the list and click on it.
4. Add the following values,

- Immigration
- Visa Application

5. Click Save to add these values.



b) Edit the "Status" Field

1. In the Quick Find box, type Object Manager and click on it.
2. Search for and select the Case object from the list.
3. Find the Status field in the list and click on it.
4. Add the following values:

- Open
- In-progress

5. Click Save to add these values.

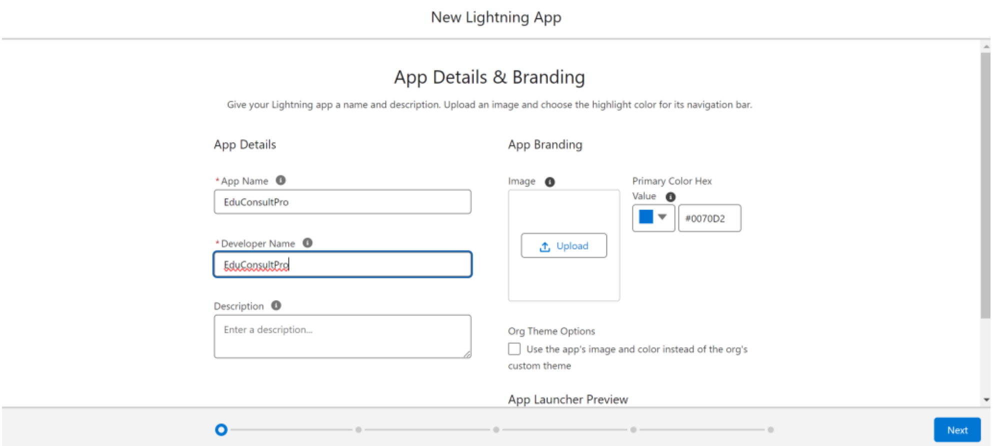
TASK 5: THE LIGHTNING APP

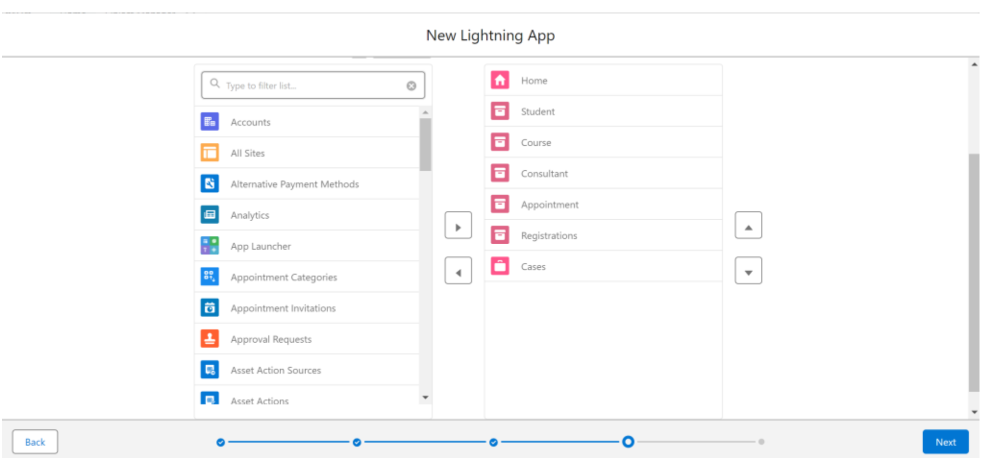
To create a lightning app page:

1. Go to setup page >> search "app manager" in quick find >> select "app manager" >> click on New lightning App.
2. App Name: Enter EduConsultPro.
3. Click Next.
4. In the Available Items list, select and add the following items to the Selected Items list:

- Home
- Students
- Courses
- Consultants
- Appointments
- Registrations
- Cases

5. After adding the items, click Next.
6. In the Available Profiles list, select System Administrator.
7. Click the arrow to move it to the Selected Profiles list.
8. Click Save & Finish.

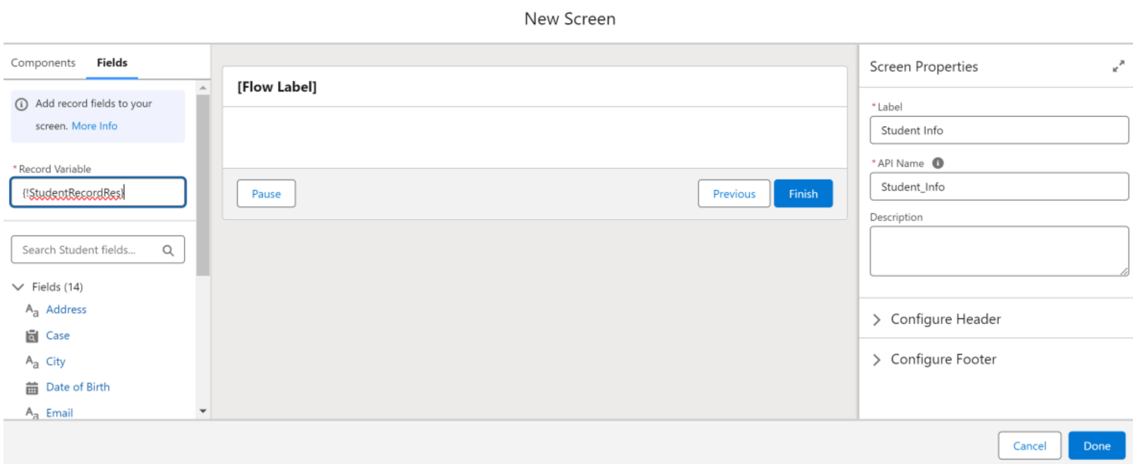


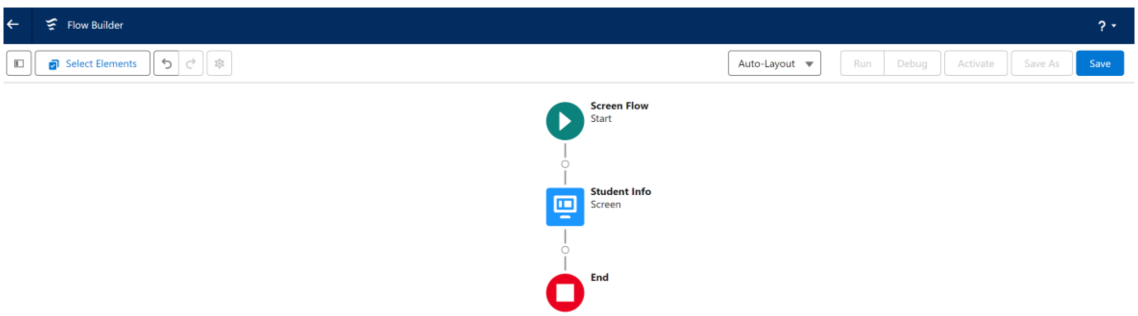


TASK 6: CREATE A SCREENFLOW FOR STUDENT ADMISSION APPLICATION PROCESS

a) Add Screen Element

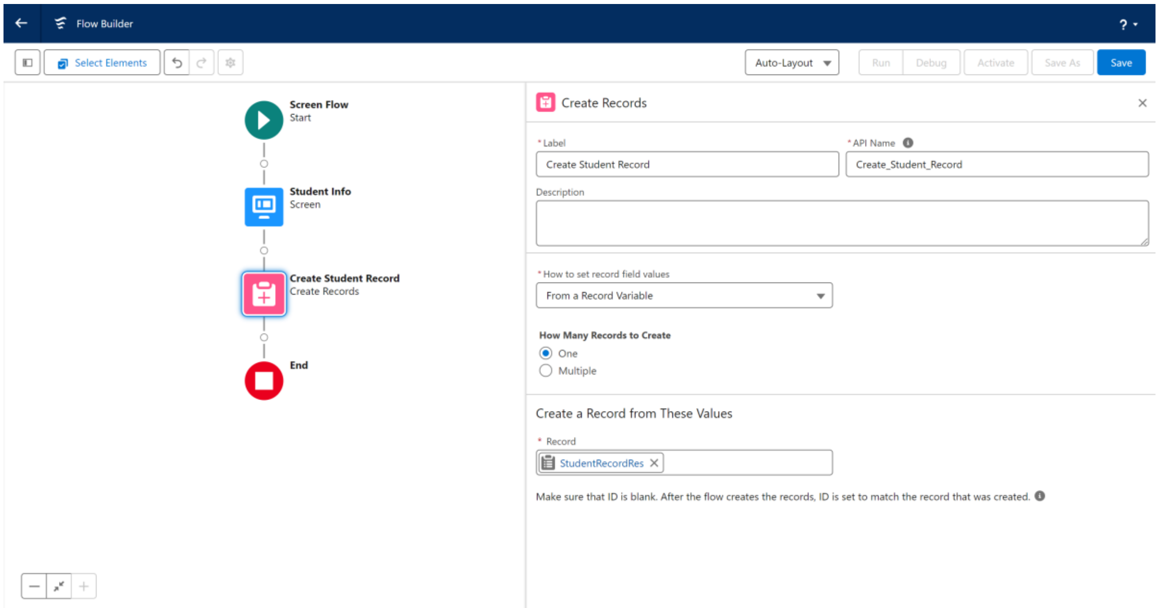
1. Select Setup from the dropdown menu.
2. In the Quick Find box, type Flow Builder and click on it.
3. Click on New Flow.
4. Select Screen Flow and click Create.
5. From the Elements panel on the left, drag the Screen element onto the canvas.
6. In the Screen Properties pane on the right, set the Label to Student Info.





b) Create Student Record using Create Element

1. In the Elements panel on the left, drag the Create Records element onto the canvas, just below the "Student Info" Screen element.
2. In the Create Records Properties pane on the right, set the Label to “Create Student Record”.
3. How Many Records to Create: Select One.
4. How to Set the Record Fields: Select Use all values from a record.
5. Create a Record from These Values: Select the record variable resource StudentRecordRes that you created in the "Student Info" Screen element.
6. Click Done to complete the configuration of the Create element.

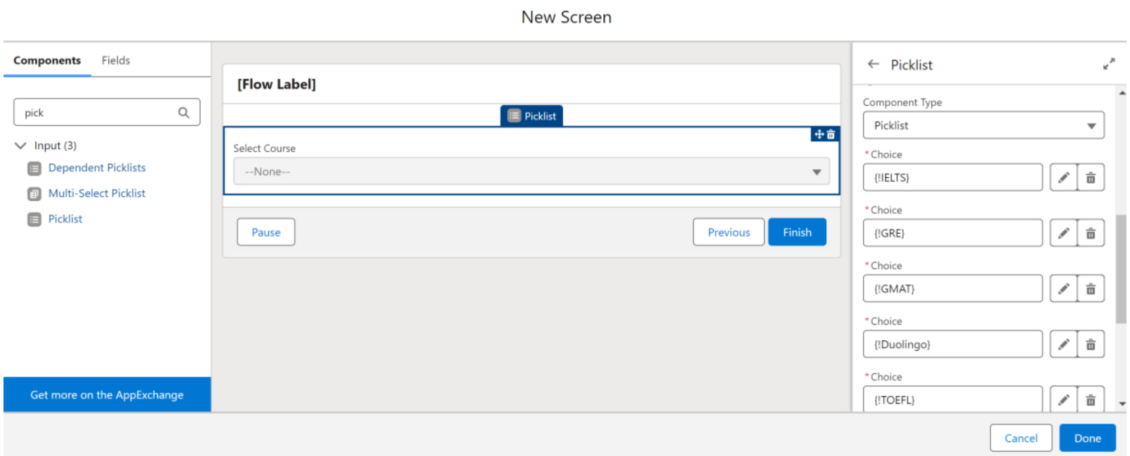


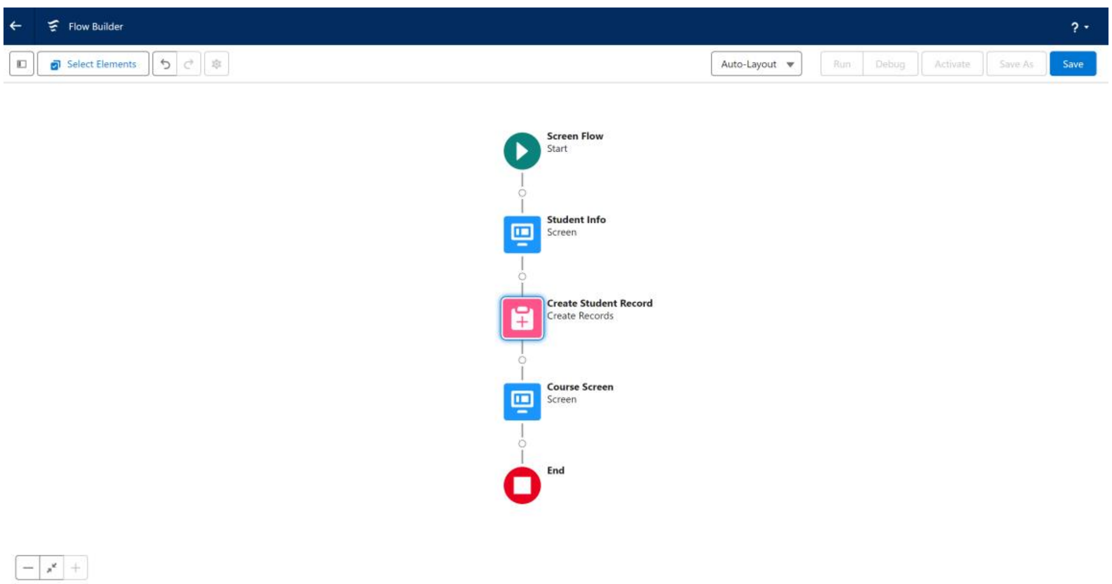
c) Add Screen Element

1. From the Elements panel on the left, drag the Screen element onto the canvas, just below the "Create Student Record" element.
2. In the Screen Properties pane on the right, set the Label to “Course Screen”.
3. In the Screen configuration, drag the Picklist component from the left panel into the screen area.
4. Set the Label of the picklist to Select Course.
5. In the Picklist component settings, go to the Choices section.
6. Under Choices, type IELTS and press Enter. This will automatically create a variable named IELTS.
7. Repeat the process for the following choices:

- GRE
- GMAT
- Duolingo
- TOEFL

8. After adding all the choices, click Done to finalize the Screen element.





d) Add Decision Element

1. From the Elements panel on the left, drag the Decision element onto the canvas, just below the "Course Screen" element.
2. In the Decision Properties pane on the right, set the Label to "Selecting Course".
3. Under Outcome Details, label the first outcome as Selected IELTS.
4. Set the condition as follows:

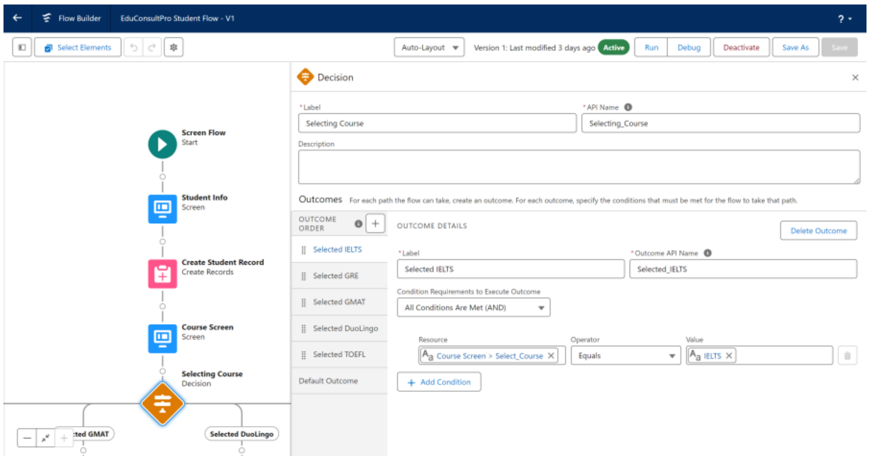
   Resource: Select_Course (the picklist component from the "Course Screen" element)

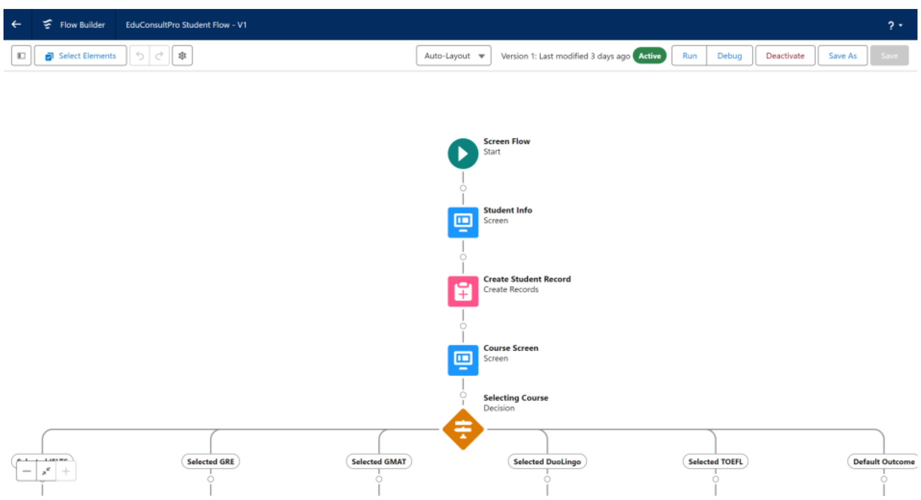
   Operator: Equals

   Value: IELTS (the choice variable from the "Course Screen" element)
5. Click on the + Add Outcome button to add new outcomes for the other course options.
6. Repeat the steps above to create conditions for:

- GRE
- GMAT
- Duolingo
- TOEFL

7. click Done.





e) Add GET Record Element

1. Drag the Get Records element onto the canvas, just after the IELTS outcome from the Decision element.
2. In the Get Records Properties pane, label the element as “Get IELTS Rec”.
3. Configure the GET Record Element:

Object: Select Course.

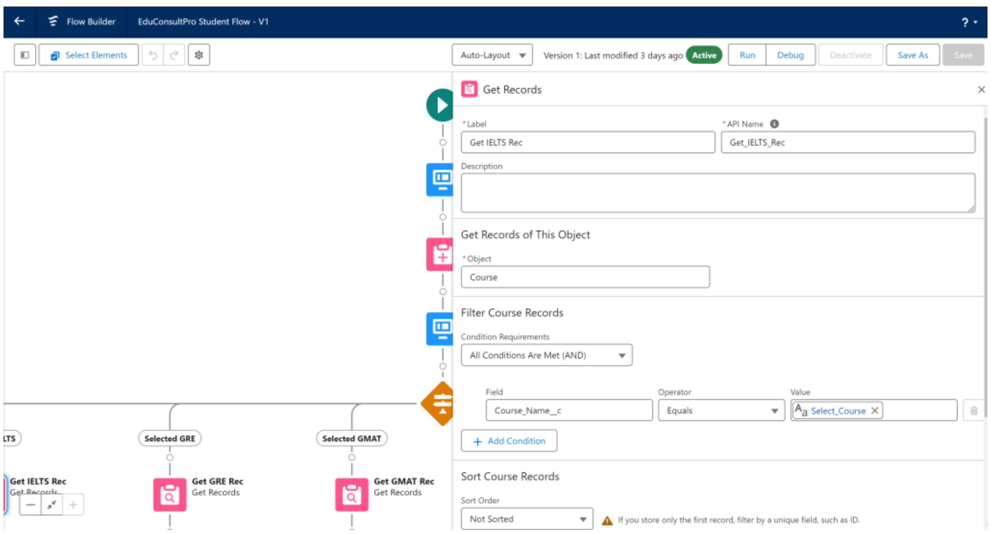
Condition Requirements: Set it to All Conditions Are Met (AND).

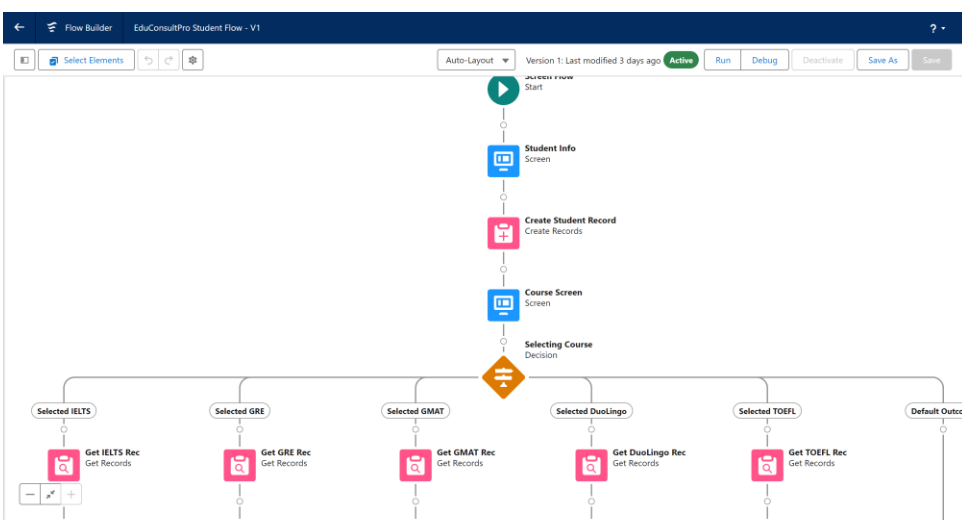
Field: Choose Course Name.
Operator: Set to Equals.
Value: Set to {!Select_Course} (the value from the Select Course Screen element).

4. Repeat steps 2 and 3 for each of the following courses:

- GRE (Label: Get GRE Rec)
- GMAT (Label: Get GMAT Rec)
- TOEFL (Label: Get TOEFL Rec)
- Duolingo (Label: Get Duolingo Rec)

5. Once all GET Record elements are configured, click Save at the top right.





f) Create Registration Record using Create Records Element

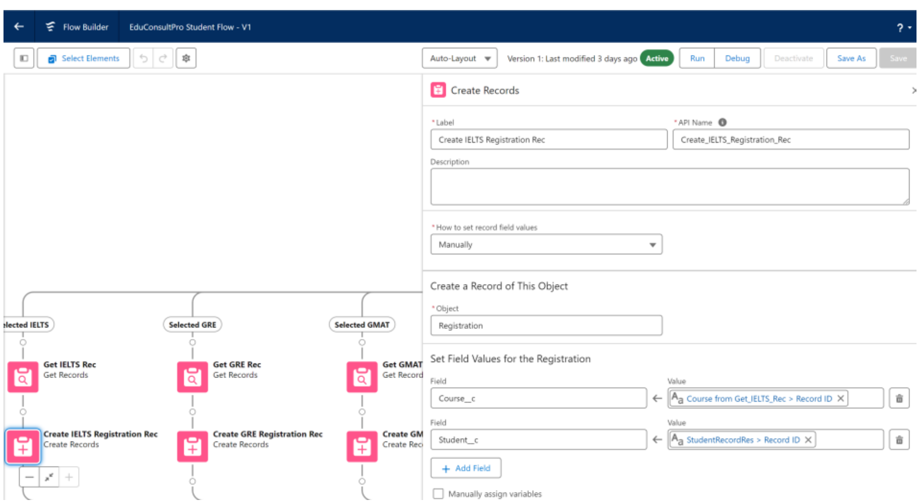
1. Drag the Create Records element onto the canvas, just after the Get IELTS Rec element.
2. In the Create Records Properties pane, label the element as Create IELTS Registration Rec.
3. Configure the Create Records Element:

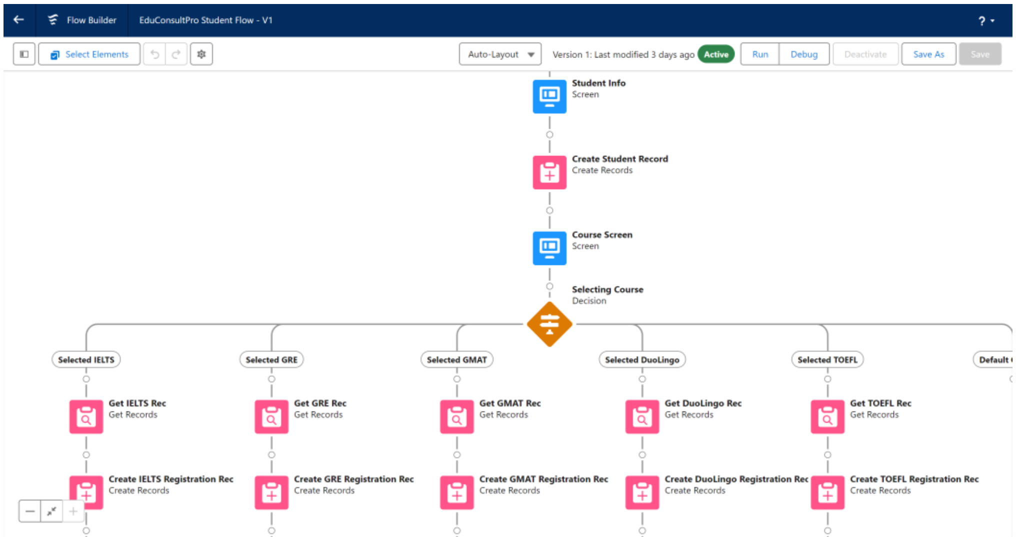
    How Many Records to Create: Select One.
    How to Set the Record Fields: Select Use separate resources, and literal values.
    Object: Select Registration.
    Field: Course_Name__c
    Value: {!Get_IELTS_Rec.Id}
    Field: Student_Name__c
    Value: {!StudentRecordRes.Id}

4. Repeat steps 2 and 3 for each of the following courses:

- GRE (Label: Create GRE Registration Rec)
- GMAT (Label: Create GMAT Registration Rec)
- TOEFL (Label: Create TOEFL Registration Rec)
- Duolingo (Label: Create Duolingo Registration Rec)

5. Once all Create Records elements are configured, click Save at the top right.





g) Create Email Text Template Variables for email body and subject

1. Click on the toggle toolbox on the left corner, click "New Resource", then select "Text Template" as Resource Type.
2. Configure the Text Template:

   API Name: Enter StuRegistrationEmailTextTempBody.
   Template Type: Select View as 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!

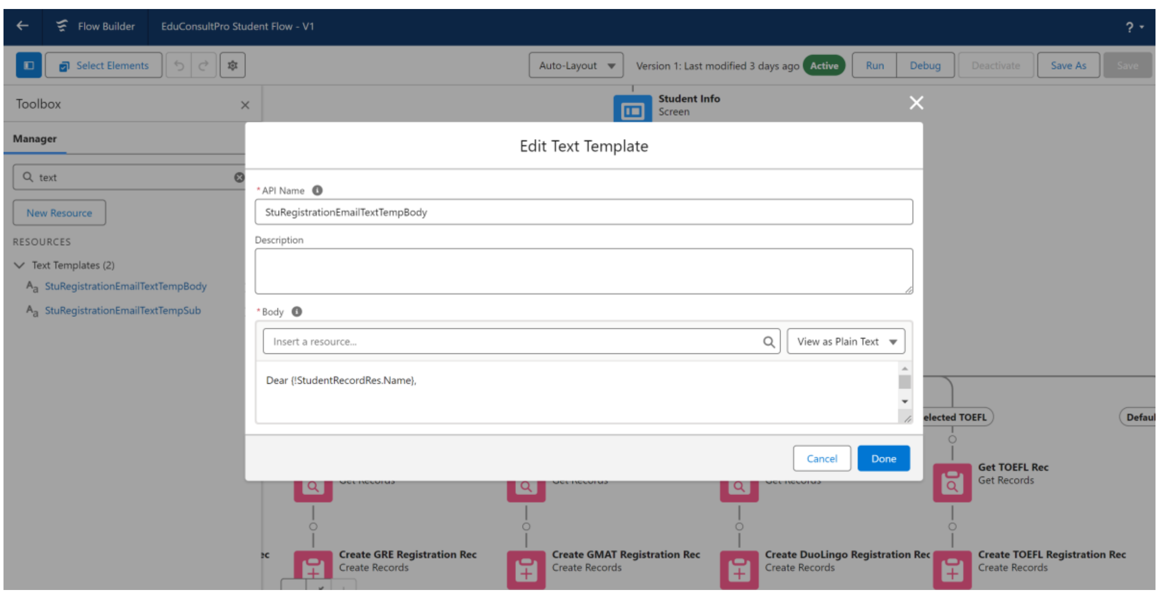
Stay Updated: Keep an eye on your inbox for important updates, announcements, and exclusive opportunities from EduConsultantPro. We'll ensure that you're informed about the latest developments and relevant information to support your journey.

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.



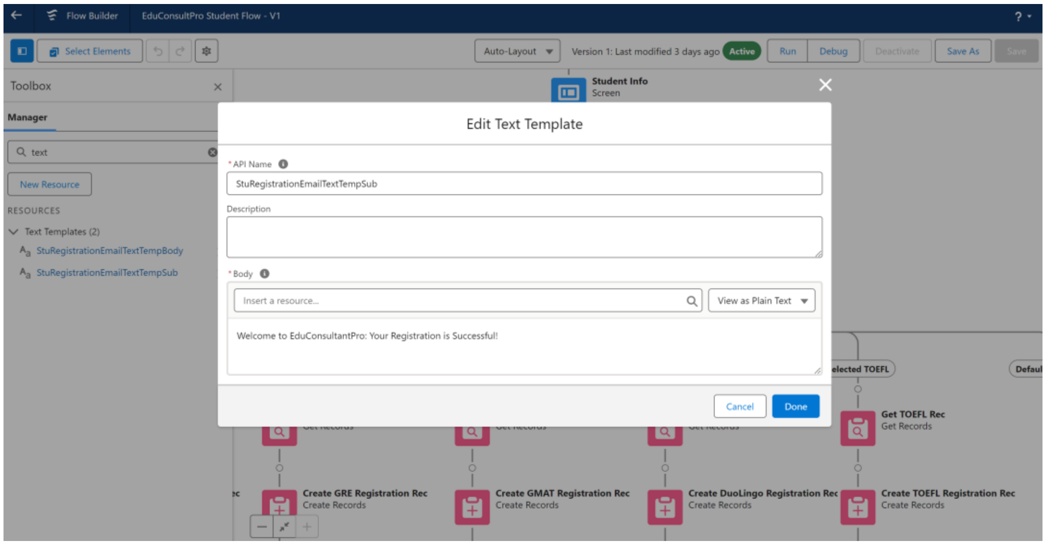
1. Click on the toggle toolbox on the left corner, click “New Resource”, then select “Text Template” as Resource Type.
2. Configure the Text Template:

    API Name: Enter StuRegistrationEmailTextTempSub.

    Template Type: Select View as Plain Text.

    Body: Enter a subject line for the email, such as:

Welcome to EduConsultantPro!



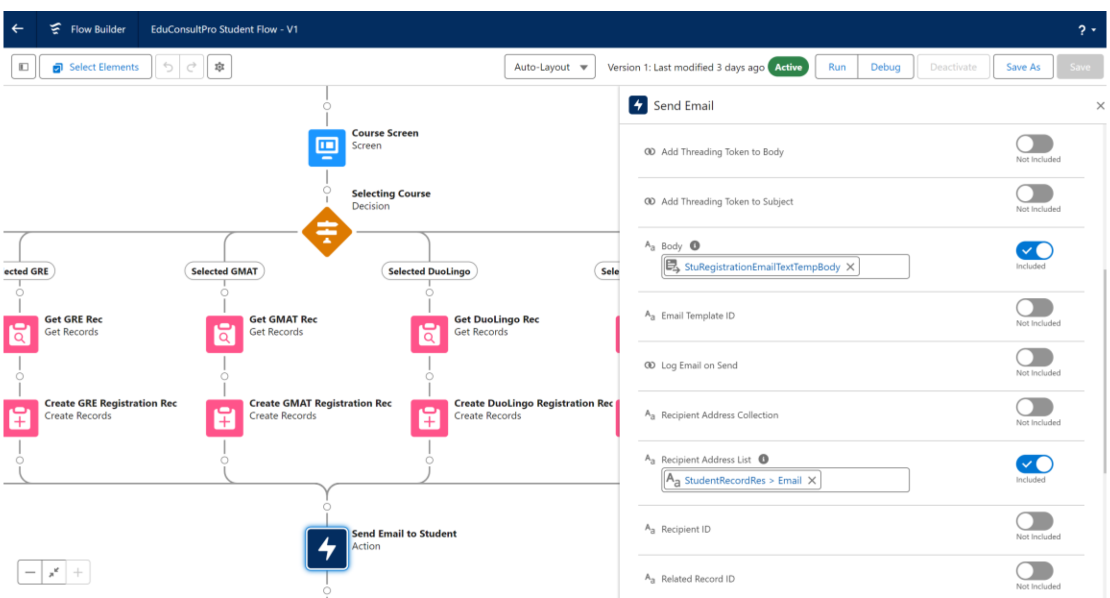
h) Add an Action Element

1. Drag the Action element onto the canvas, placing it after all the Decision paths (i.e., after the paths for IELTS, GRE, GMAT, TOEFL, and Duolingo).
2. Label the Action Element as "Send Email to Student".
3. Set Input Values for Selected Action:

   Body: Set to {!StuRegistrationEmailTextTempBody}.

   Recipient Address List: Set to {!StudentRecordRes.Email__c}.

   Subject: Set to {!StuRegistrationEmailTextTempSub}.
4. Click Save at the top right to save your changes.



i) Add Screen Element

1. Drag a Screen element onto the canvas, placing it after the Send Email to Student Action Element.
2. Label this Screen element as “Success Screen”.
3. From the left side panel, search for the Display Text component and drag it to the main panel of the Success Screen.
4. Label the Display Text component as “SuccessMessage”.
5. In the Resource Picker box for the Display Text component, paste the following text:

   Dear {!StudentRecordRes.Name},

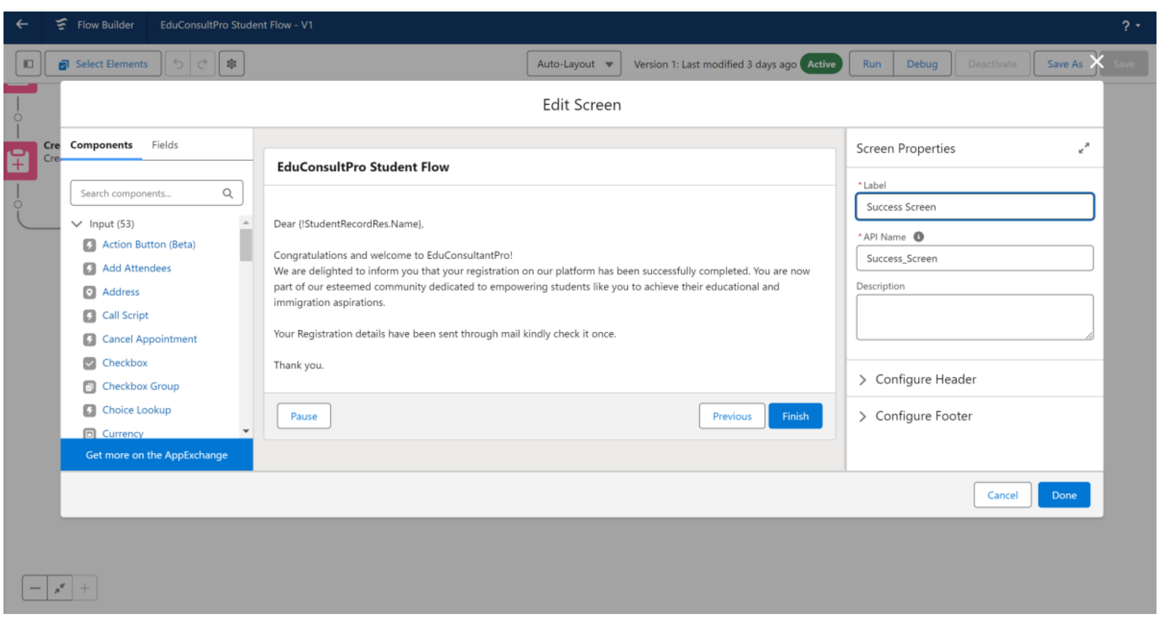
   Congratulations and welcome to EduConsultantPro!

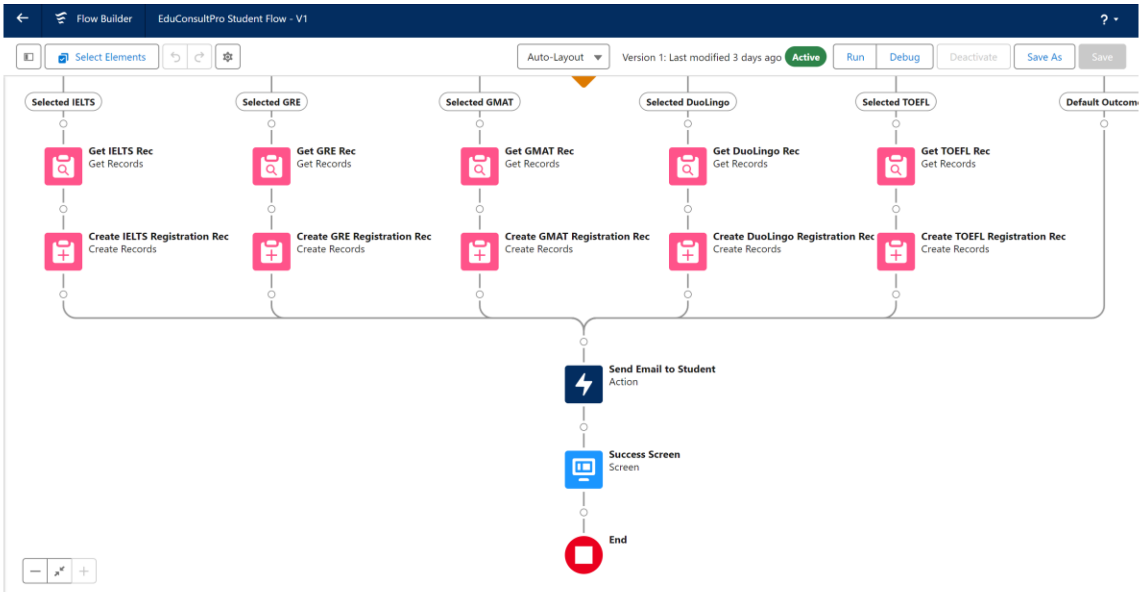
   We are delighted to inform you that your registration on our platform has been successfully completed. You are now part of our esteemed community dedicated to empowering students like you to achieve their educational and immigration aspirations.

   Your registration details have been sent through mail. Kindly check it once.

   Thank you.

6. Click Done to save the Display Text component.
7. Click Save at the top right.
8. Name the Flow EduConsultPro Student Flow.
9. click Activate to make the Flow live.





TASK 7: CREATE USERS

a) User

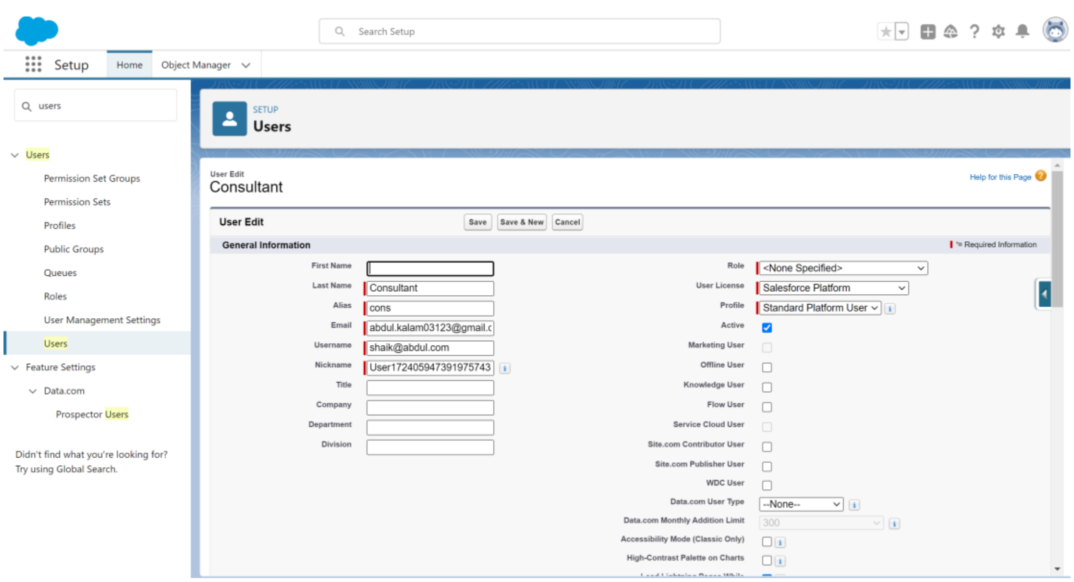
1. Go to Setup --> Administration --> Users --> New User

   LastName: Consultant

   License: Salesforce Platform

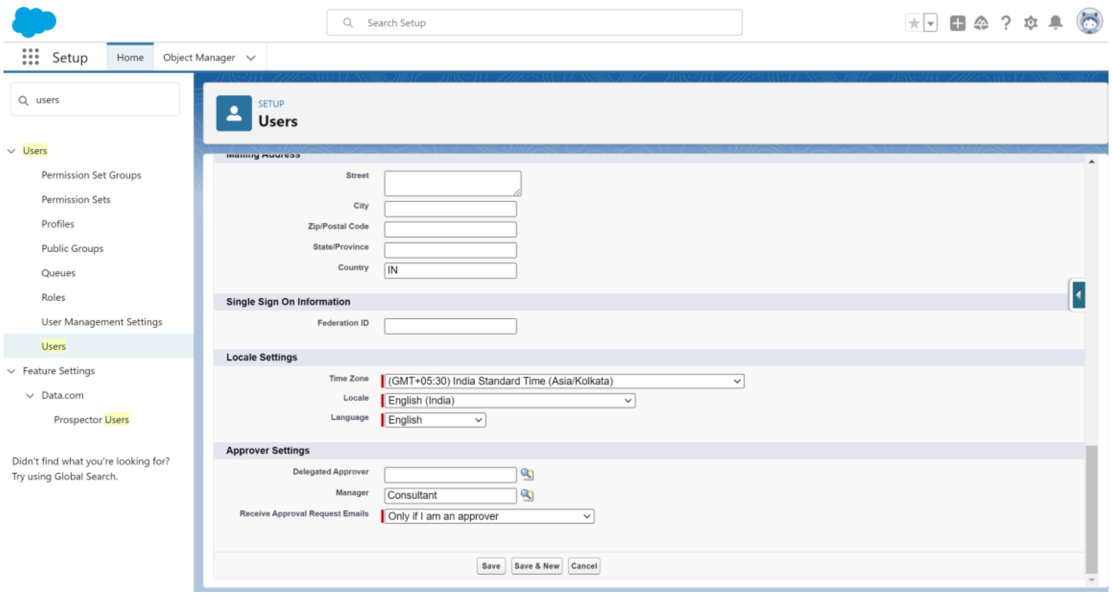
   Profile: Standard Platform User

2. Fill all the mandatory fields & save.



b) Configure the User Settings

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



TASK 8: CREATE AN EMAIL TEMPLATE

Go to the App Launcher and search for Email Templates.

1. Click New Folder.
2. Enter the desired folder name.
3. Save the folder.
4. Access Lightning Email Templates:

- Go to Setup.
- Enter Templates in the Quick Find box and select Lightning Email Templates.
- Toggle it on if not already enabled.

a) Create an Email Template for Submission Template

1. Click New Email Template.
2. Select the folder created earlier.
3. Enter Submission Template as the name.
4. Paste the following HTML code in the HTML Value field:

Dear {{{Appointment__c.Student_Name__c}}}, I hope this email finds you well. I am writing to confirm the details of our upcoming appointment scheduled for {{{Appointment__c.Appointment_DateTime__c}}} regarding {{{Appointment__c.PurposeTopic__c}}}.

Appointment Details:

Appointment No : {{{Appointment__c.Name}}},

Student Name : {{{Appointment__c.Student_Name__c}}},

Consultant Name : {{{Appointment__c.Consultant__c}}},

Date & Time : {{{Appointment__c.Appointment_DateTime__c}}},

Purpose : {{{Appointment__c.PurposeTopic__c}}}

I want to assure you that I am looking forward to our meeting and am fully prepared to address any questions or concerns you may have regarding {{{Appointment__c.PurposeTopic__c}}}. Your success and satisfaction are my top priorities, and I am committed to providing you with the guidance and support you need.

If you have any specific topics or questions you would like to discuss during our appointment, please feel free to share them with me in advance. This will help ensure that our time together is as productive and beneficial as possible.

If for any reason you need to reschedule or cancel our appointment, please notify me at your earliest convenience so that we can make alternative arrangements.

Once again, thank you for choosing to work with me on this matter. I am confident that our collaboration will lead to positive outcomes and progress toward your goals.

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

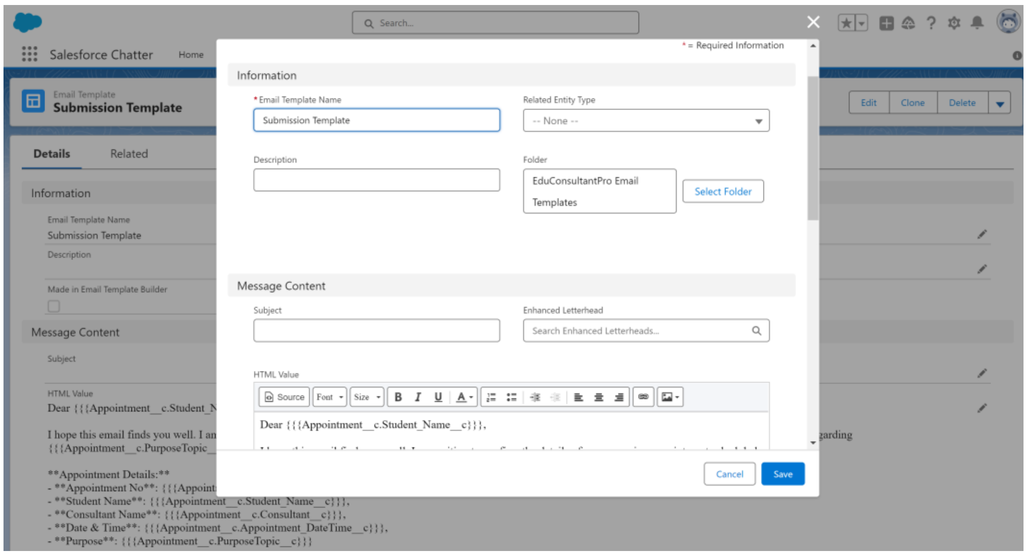
Looking forward to our meeting.

Best regards,

{{{Recipient.Name}}},

EduConsultantPro

5. Click Save.



b) Create an Email Template for Submission Template

1. Create Approval Template.
2. Click New Email Template.
3. Select the folder created earlier.
4. Enter Approval Template as the name.
5. Add HTML content similar to the Submission Template but modified for approval:

Dear {{{Recipient.Name}}},

We are pleased to inform you that your request has been approved.

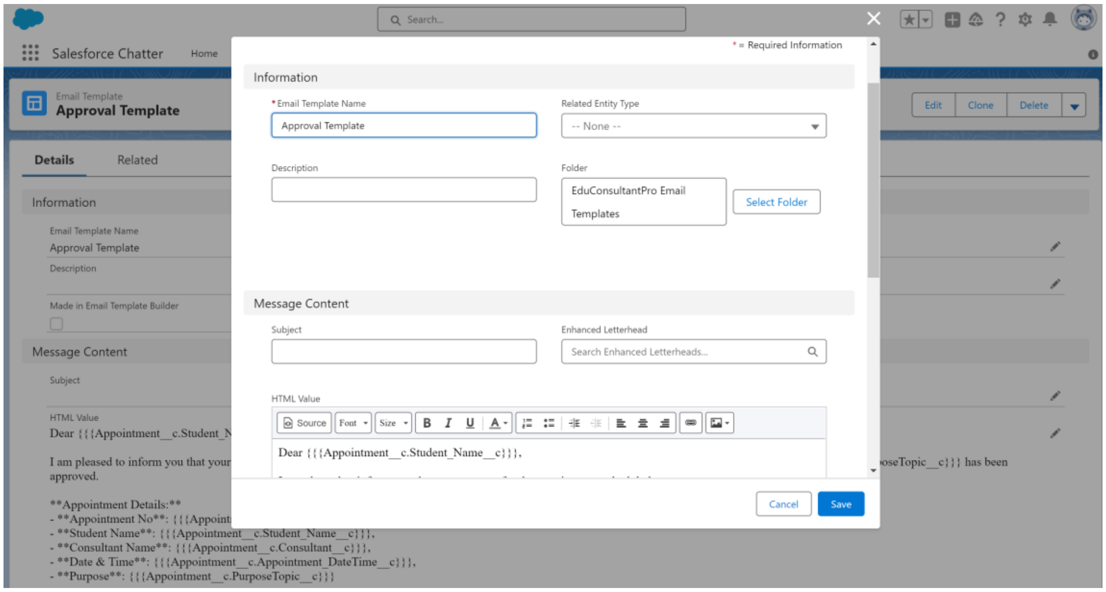
Here are the details of your request:
Request No : {{{Request__c.Name}}},
Student Name : {{{Request__c.Student_Name__c}}},
Approved By : {{{Request__c.Approved_By__c}}},
Date : {{{Request__c.Approval_Date__c}}},

Thank you for your patience throughout this process. If you have any questions or require further assistance, please do not hesitate to contact us.

Best regards,

EduConsultantPro

6. Click Save.



c) Create an Email Template for Rejection Template

1. Click New Email Template.
2. Select the folder created earlier.
3. Enter Rejection Template as the name.
4. Add HTML content similar to the Submission Template but modified for rejection:
   Dear {{{Recipient.Name}}},

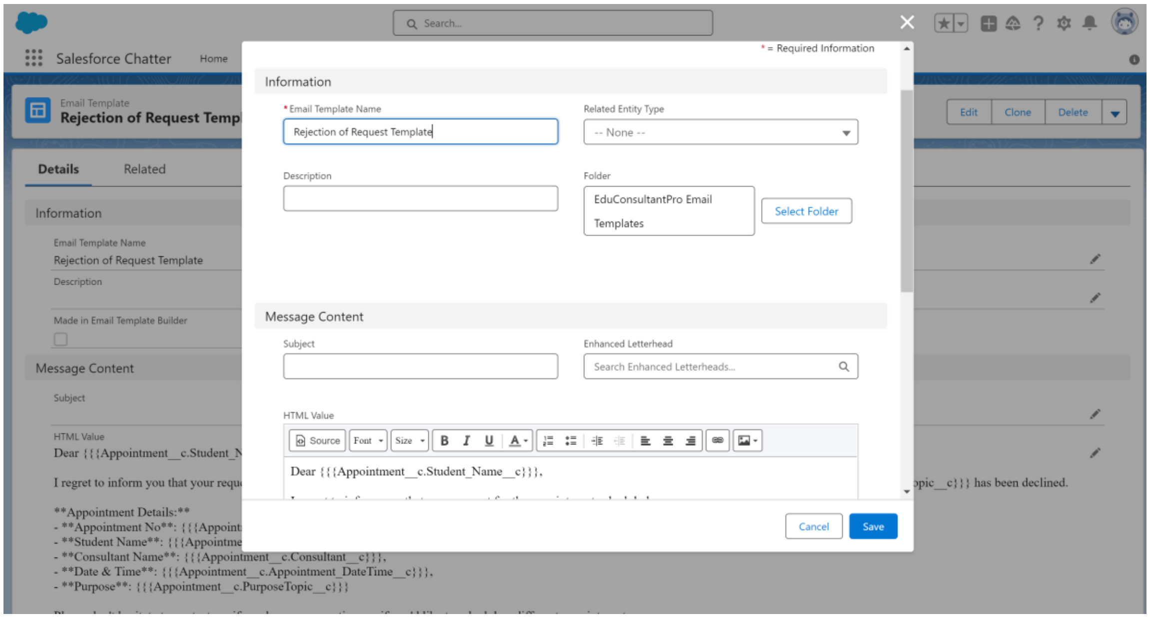
   We regret to inform you that your request has been rejected.

   Here are the details of your request:
   Request No : {{{Request__c.Name}}},
   Student Name : {{{Request__c.Student_Name__c}}},
   Rejected By : {{{Request__c.Rejected_By__c}}},
   Date : {{{Request__c.Rejection_Date__c}}},

   We understand that this may be disappointing news. If you need further clarification or have any questions, please do not hesitate to contact us.

   Best regards,
   EduConsultantPro

5. Click Save.



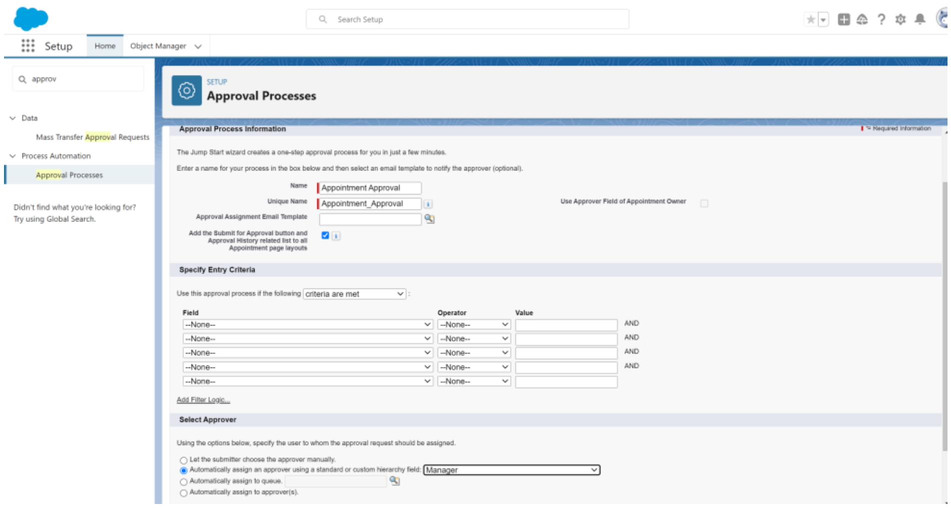
TASK 9: CREATE AN APPROVAL PROCESS FOR PROPERTY OBJECT

a) Create New Approval Process

1. Go to Setup.
2. Enter Approval in the Quick Find box and select Approval Processes.
3. In Manage Approval Processes For, select Appointment.
4. Click Create New Approval Process.

- Choose Use Jump Start Wizard.
- Process Name: Appointment Approval
- Under Select Approver: Select Manager for the option: “Automatically assign an approver using a standard or custom hierarchy field.”

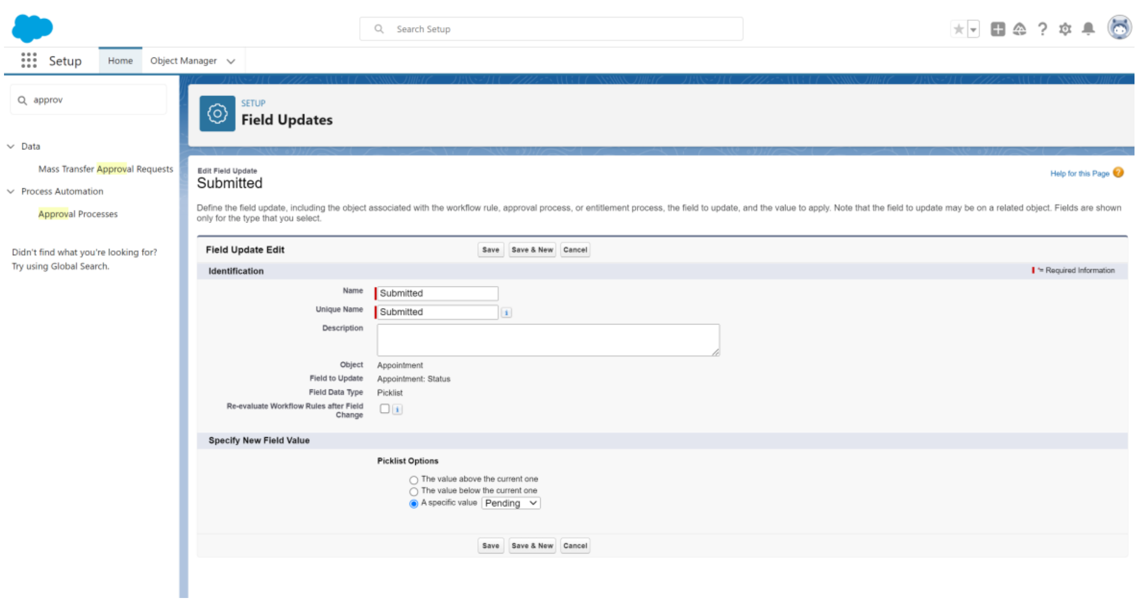
5. Click Next and Next under Automated Approver Determined By: Select Manager.
6. From Record Editability Properties: Choose Administrators OR the currently assigned approver can edit records during the approval process.
7. Click Save.



b) Configure Initial Submission Actions

Field Update

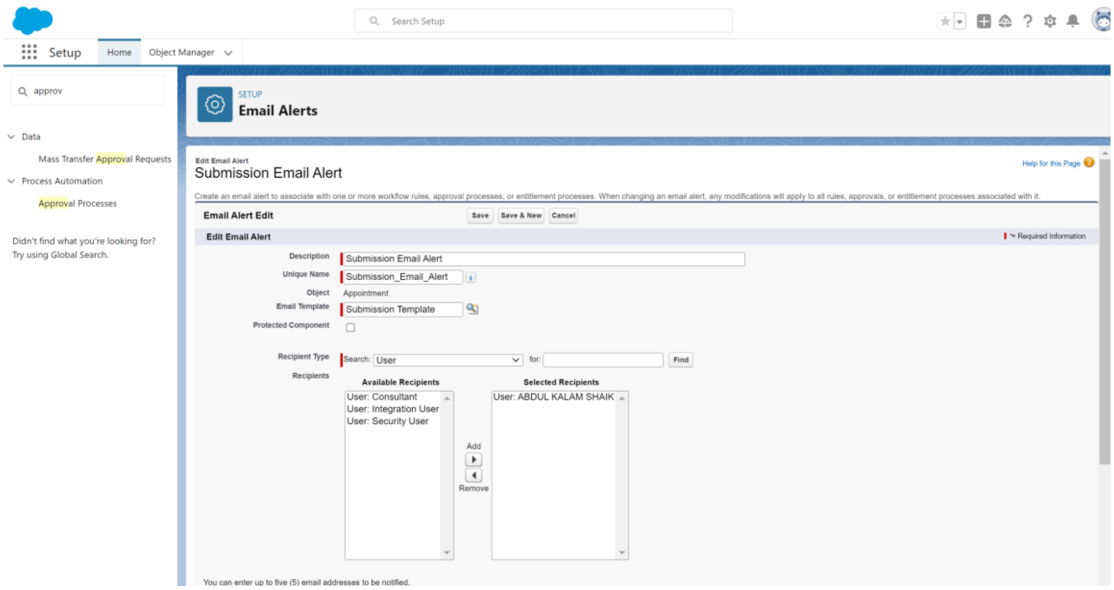
1. Click Add New → Field Update.
2. Name: Submitted
3. Field to Update: Appointment: Status
4. A Specific value: Pending
5. Click Save.



Email Alert

1. Click Add New → Email Alert.
2. Description: Submission Email Alert
3. Unique Name: Auto-populates
4. Email Template: Submission Template

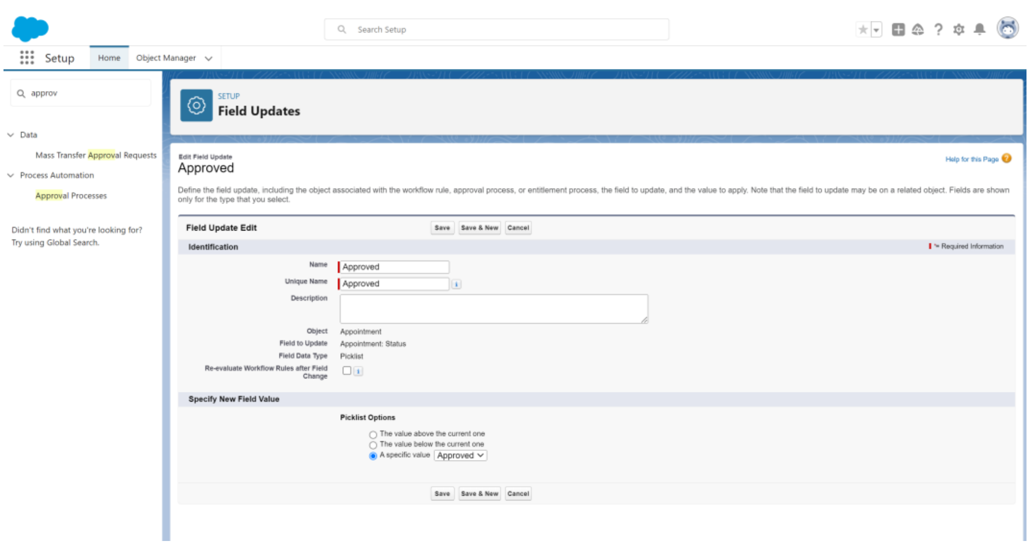
5. Recipient Type: Select Your Name
6. Click Save.



c) Configure Final Approval Actions

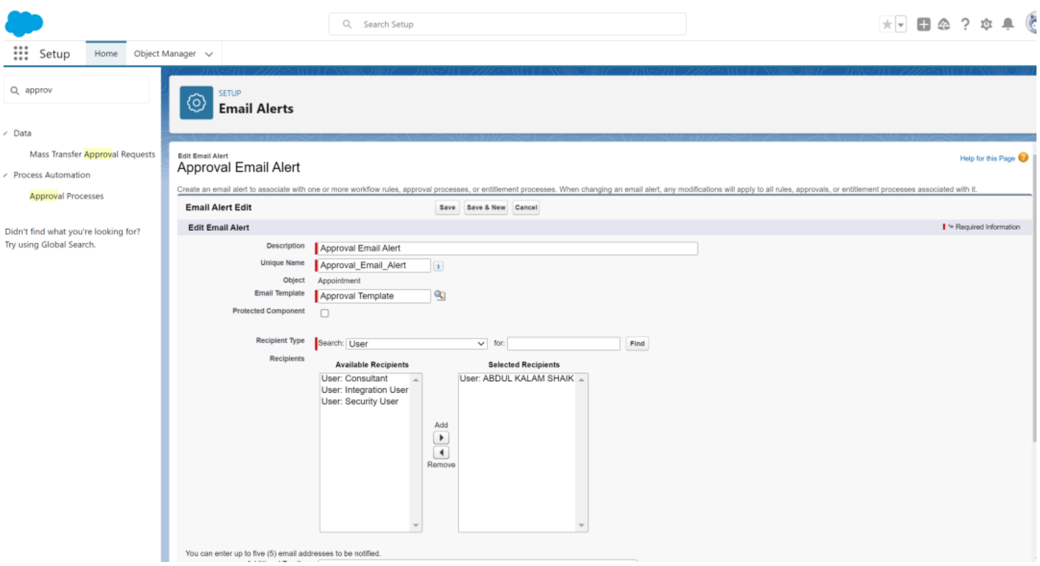
Field Update

1. Click Add New → Field Update.
2. Name: Approved
3. Field to Update: Appointment: Status
4. A Specific value: Approved
5. Click Save.



Email Alert

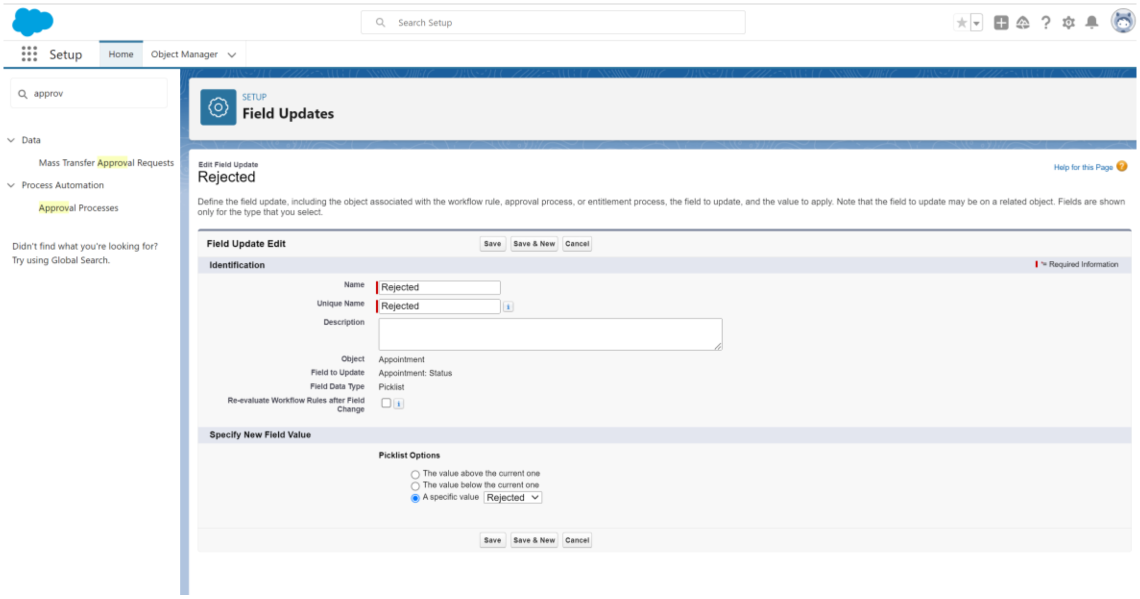
1. Click Add New → Email Alert.
2. Description: Approval Email Alert
3. Unique Name: Auto-populates
4. Email Template: Create or use an existing email template for approval notification.
5. Recipient Type: Select the appropriate recipient.
6. Click Save.



d) Configure Final Rejection Actions

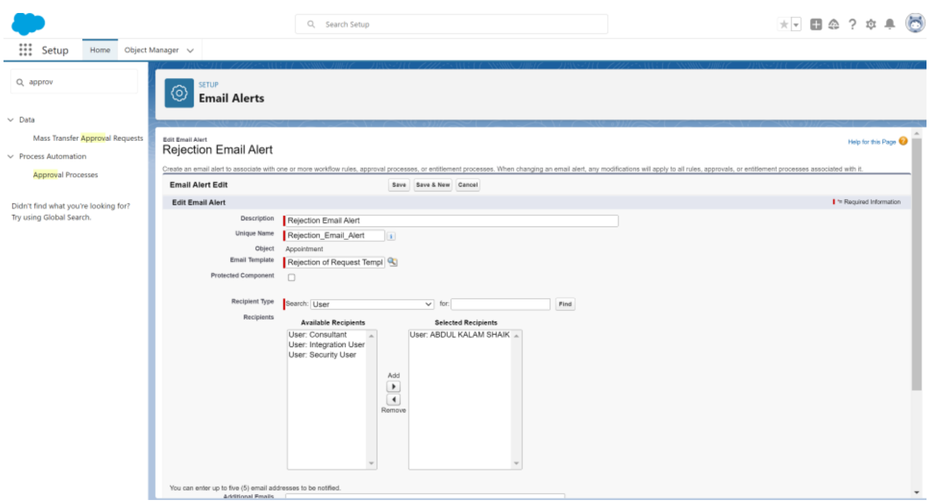
Field Update

1. Click Add New → Field Update.
2. Name: Rejected
3. Field to Update: Appointment: Status
4. A Specific value: Rejected
5. Click Save.



Email Alert

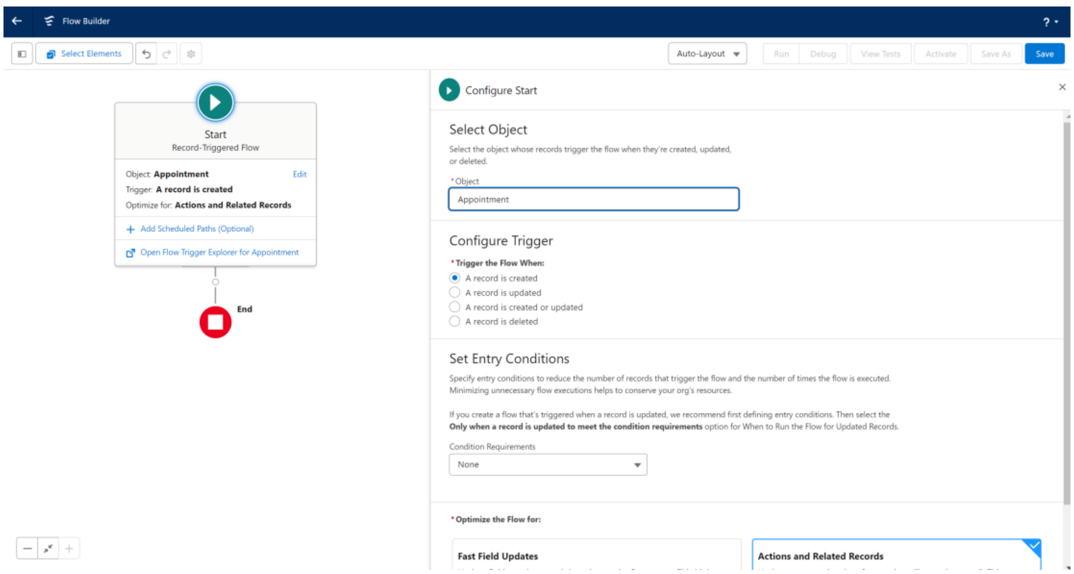
1. Click Add New → Email Alert.
2. Description: Rejection Email Alert
3. Unique Name: Auto-populates
4. Email Template: Create or use an existing email template for rejection notification.
5. Recipient Type: Select the appropriate recipient.
6. Click Save.



TASK 10: CREATE A RECORD TRIGGERED FLOW

a) Configure the Start Element

1. From Setup, enter Flows in the Quick Find box and select Flows.
2. Click New Flow.
3. Select Record-Triggered Flow.
4. Click Create. The Configure Start window opens.
5. For Object: Select Appointment.
6. For Trigger the Flow When: Select A record is created.



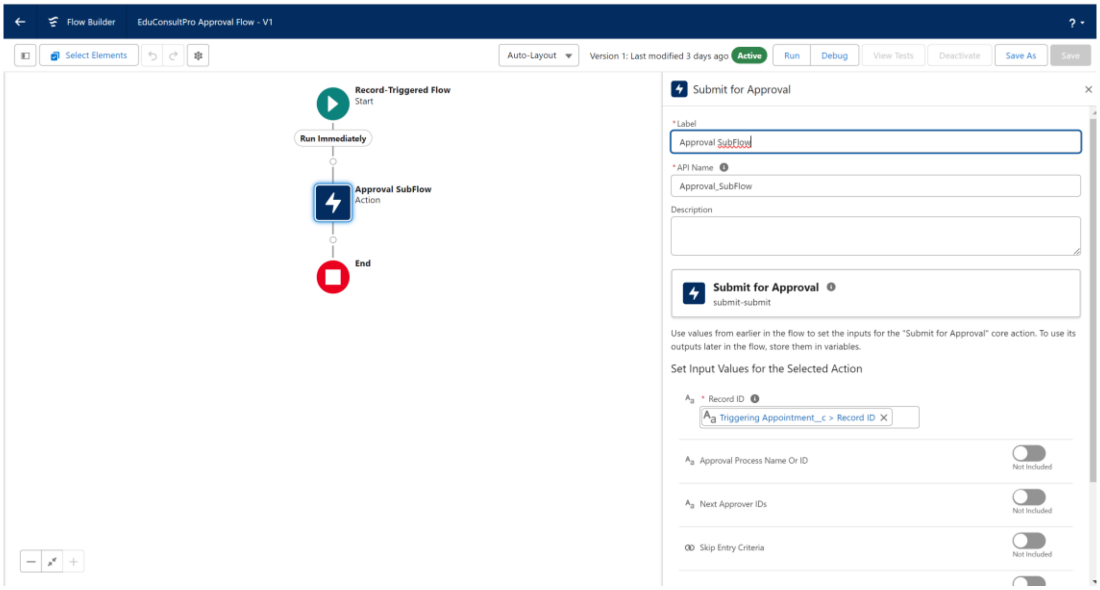
b) Add an Action Element

1. Drag an Action element onto the canvas after the Start element.
2. Configure Action Element:

   Select Action: Choose Submit for Approval.

   Label: Enter Approval SubFlow.

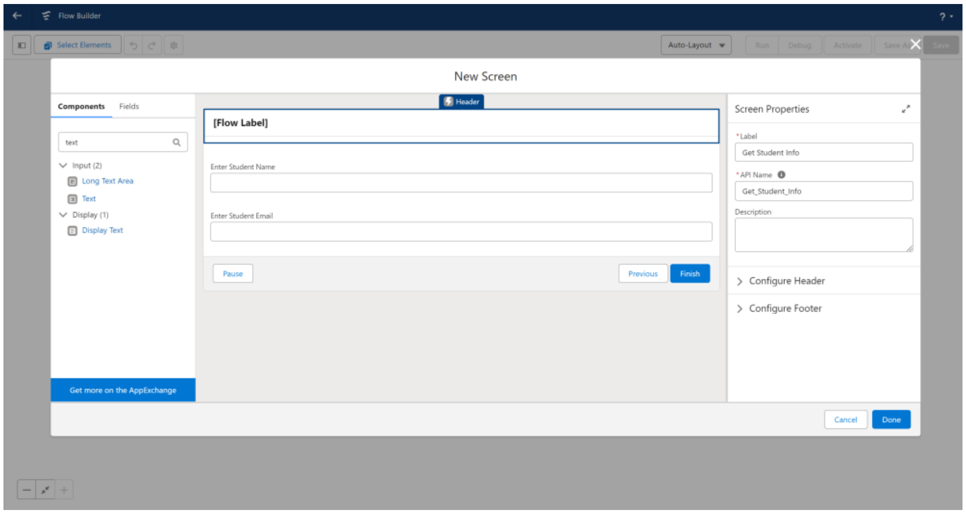
   Set RecordId: Set to {!$Record.Id}.
3. Click Save.
4. Flow Name: Enter EduConsultPro Approval Flow.
5. Click Activate.

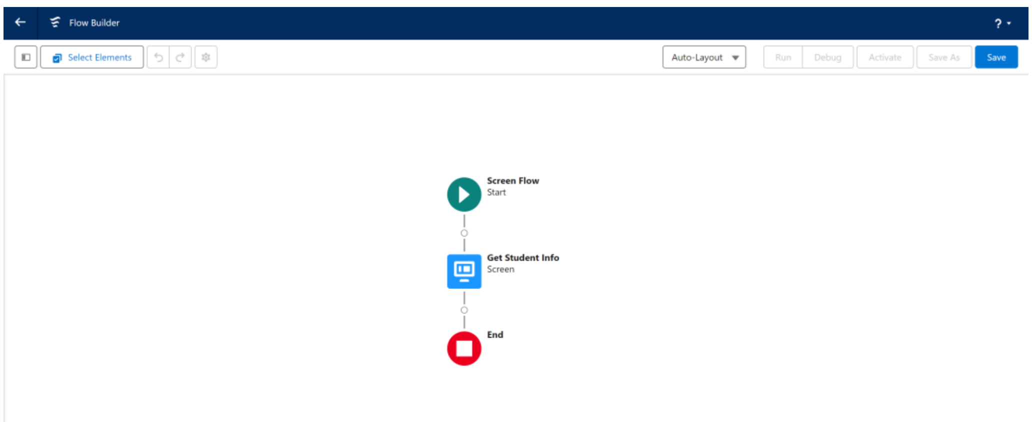


TASK 11: CREATE A SCREENFLOW FOR EXISTING STUDENT TO BOOK AN APPOINTMENT

a) Add Screen Element

1. From Setup, enter Flow Builder in the Quick Find box and select Flow Builder.
2. Click New Flow and select Screen Flow.
3. Click Create.
4. Drag a Screen element onto the canvas.
    - Label: Enter Get Student Info.
    - Add Components:
5. Drag a Text component from the left side panel to the screen.
    Label: Enter Enter Student Name.
6. Drag another Text component from the left side panel to the screen.
    Label: Enter Enter Student Email.





b) Add GET Record Element

1. After the Screen element, drag a Get Records element onto the canvas.
2. Configure GET Record Element:

    Label: Enter Get Rec.

    Object: Select Student.

    Condition Requirements: Select All Conditions are Met (AND).
3. Set Conditions:

    Field: Select Student Name.

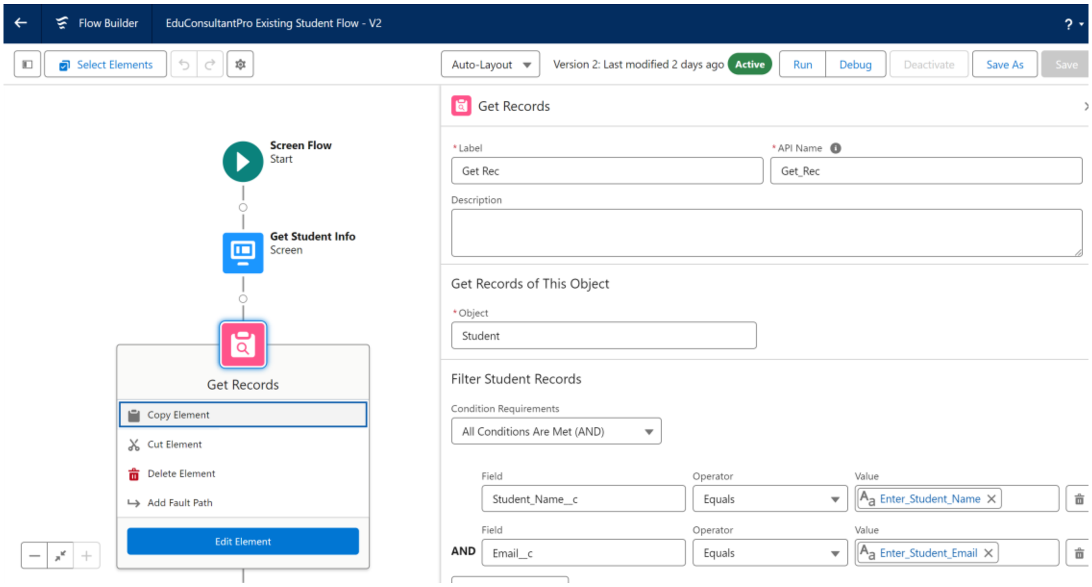
    Operator: Select Equals.

    Value: Select !{Enter_Student_Name}.
4. Click + Add Condition to add another condition.

    Field: Select Email__c.

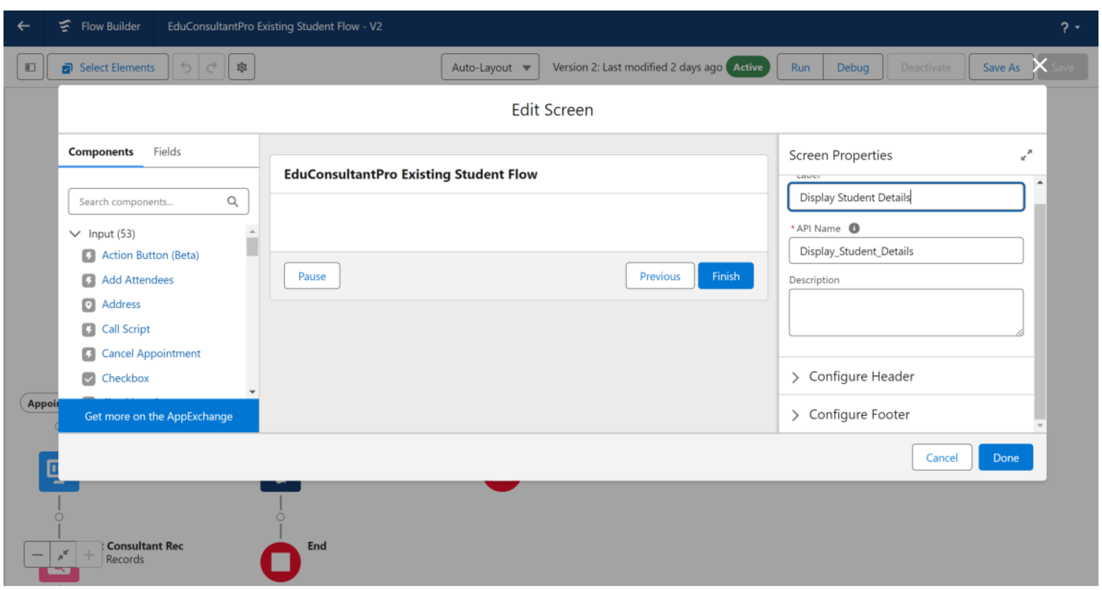
    Operator: Select Equals.

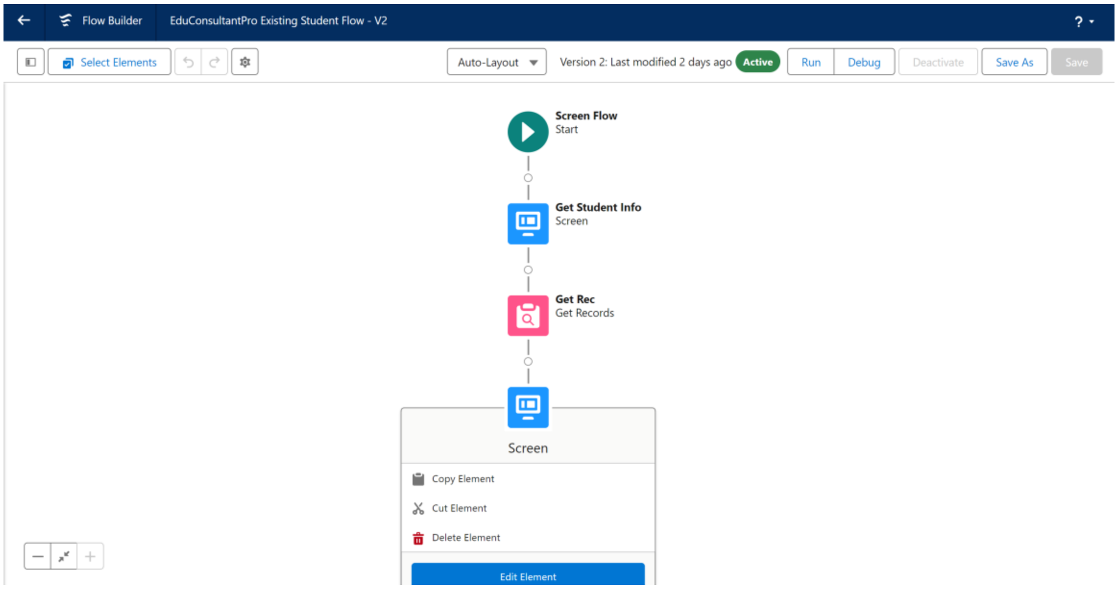
    Value: Select !{Enter_Student_Email}.
5. Click Done to complete the configuration of the GET Record element.



c) Add Screen element

1. After the GET Record Element, drag a Decision element onto the canvas.
2. Label: Display Student Details
3. Click save.





d) **Add Decision Element**

1. After the Select Display Student Details Element, drag a Decision element onto the canvas.
2. Label: Enter Appointment or Case.
3. Outcome 1:

    Label: Enter Appointment.

    Condition:

    Resource: Select !{How_may_I_Help_you} (This should be a variable or field from the previous screen element).

    Operator: Select Equals.

    Value: Enter !{Book_an_Appointment}.
4. Outcome 2: (For Case)

    Click the + icon to add another outcome.

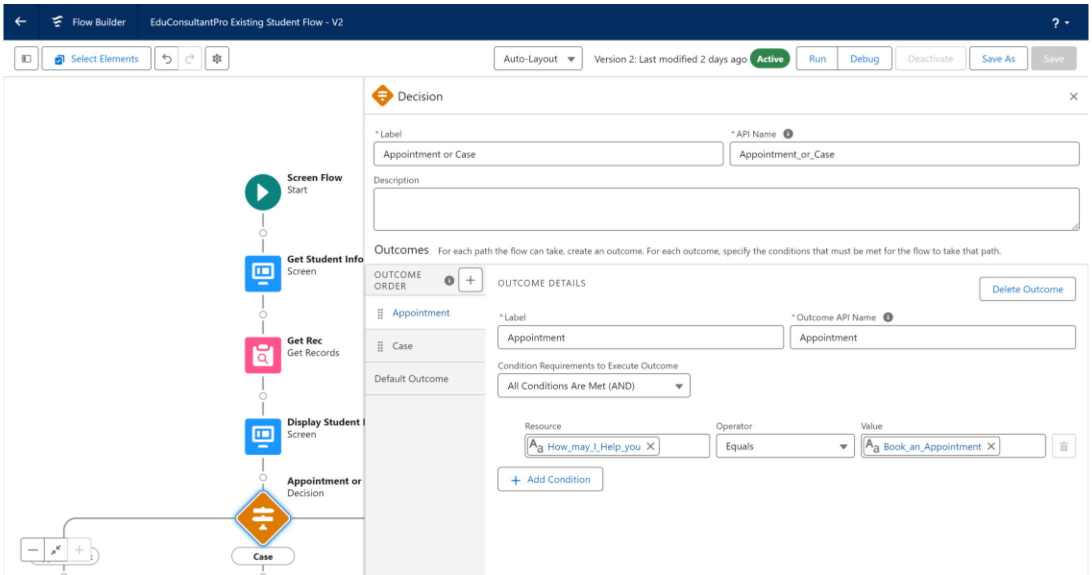
    Label: Enter the label for the Case option.

    Condition:

    Resource: Select !{How_may_I_Help_you}.

    Operator: Select Equals.

    Value: Enter the value corresponding to the Case option.
5. Once you've added all necessary outcomes, click Done.



e) Add Screen Element

1. After the Decision Element (on the Appointment path), drag a Screen element onto the canvas.
2. Label: Enter Appointment Booking Screen.
3. In the Screen Properties panel, click on Fields.
4. Click on the Record Variable Input and select the option to Create a New Resource.
5. Create New Resource:

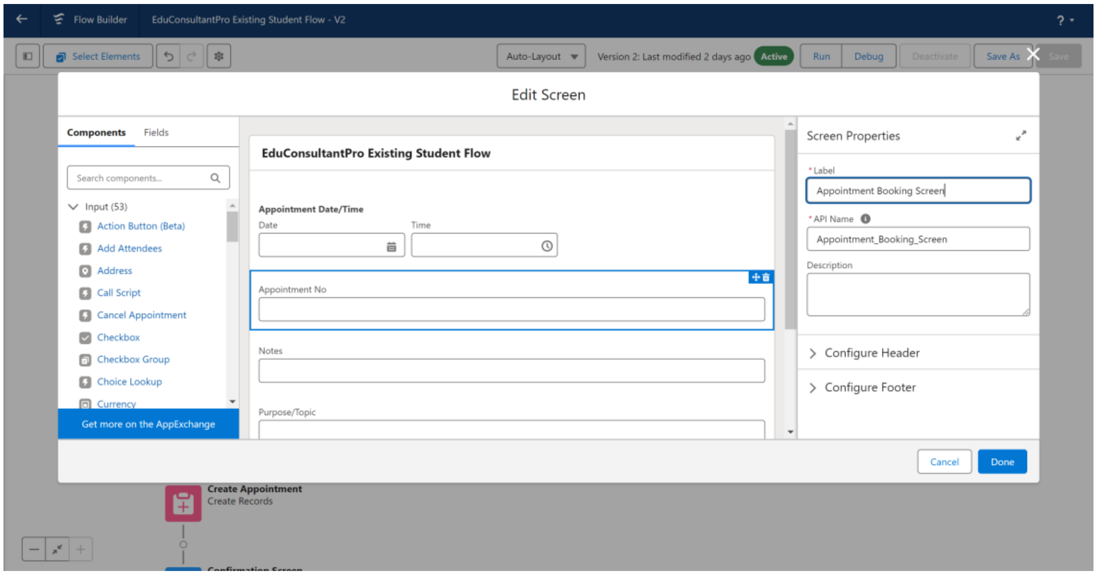
    Resource Type: Select Variable.

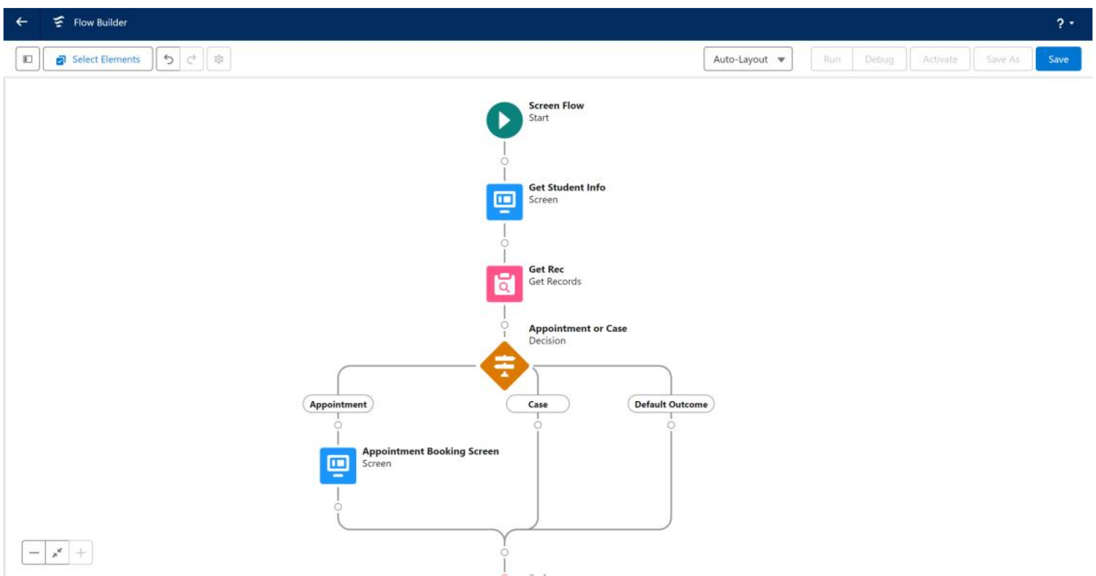
    API Name: Enter AppointmentRecordRes.

    Data Type: Select Record.

    Object: Choose Appointment from the list of objects.

6. Click Done.
7. Drag and drop the required fields from the AppointmentRecordRes variable into the screen.
8. Ensure you include all necessary fields to collect the student's appointment details (e.g., Appointment Date, Student Name, Consultant Name, Purpose, etc.).
9. After adding all required fields, click Done.



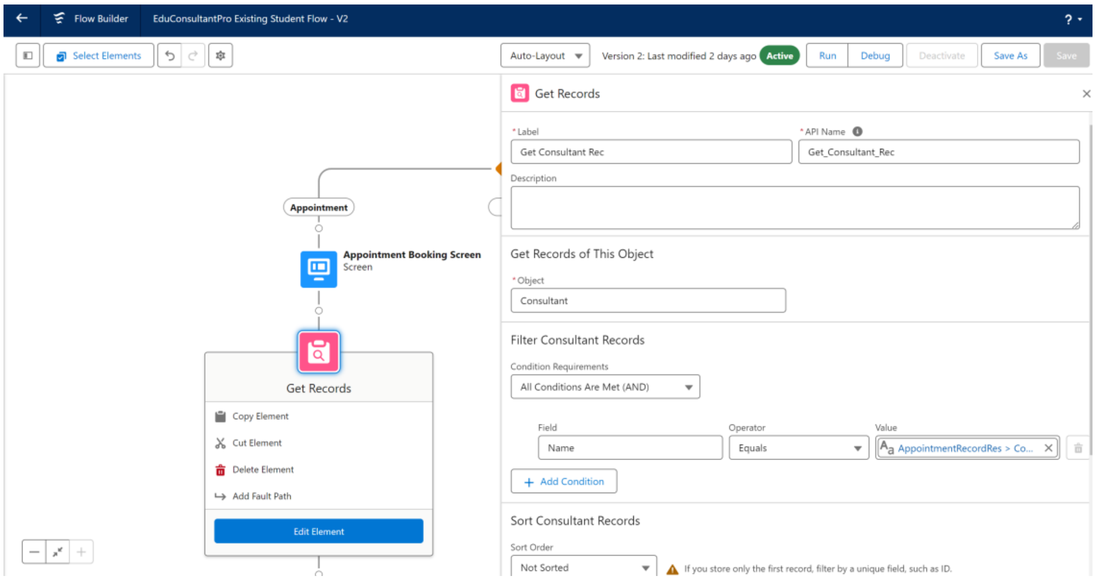


f) Add GET Record Element

1. After the Decision Element (under the Appointment path), drag a GET Record element onto the canvas.
2. Configure GET Record Element:
   Label: Enter Get Consultant Rec.
   Object: Select Consultant from the list of objects.
3. Set Condition Requirements:
   Condition Requirements: Select All Conditions are Met (AND).
   Field: Choose Name.
   Operator: Select Equals.

Value: Enter {!AppointmentRecordRes.Consultant_Name__c}.

4. Click Done.



g) Create Appointment Record using Create Records Element

1. After the Get Consultant Rec element, drag a Create Records element onto the canvas.
2. Configure Create Records Element:

    Label: Enter Create Appointment.

    How Many Records to Create: Select One.

    How to Set the Record Fields: Select Use separate resources, and literal values.

3. Select object 'Appointment'.
4. Map the Fields:

    Field: Appointment_DateTime__c

    Value: {!AppointmentRecordRes.Appointment_DateTime__c}

    Field: Consultant__c

    Value: {!Get_Consultant_Rec.Id}

    Field: Notes__c

    Value: {!AppointmentRecordRes.Notes__c}

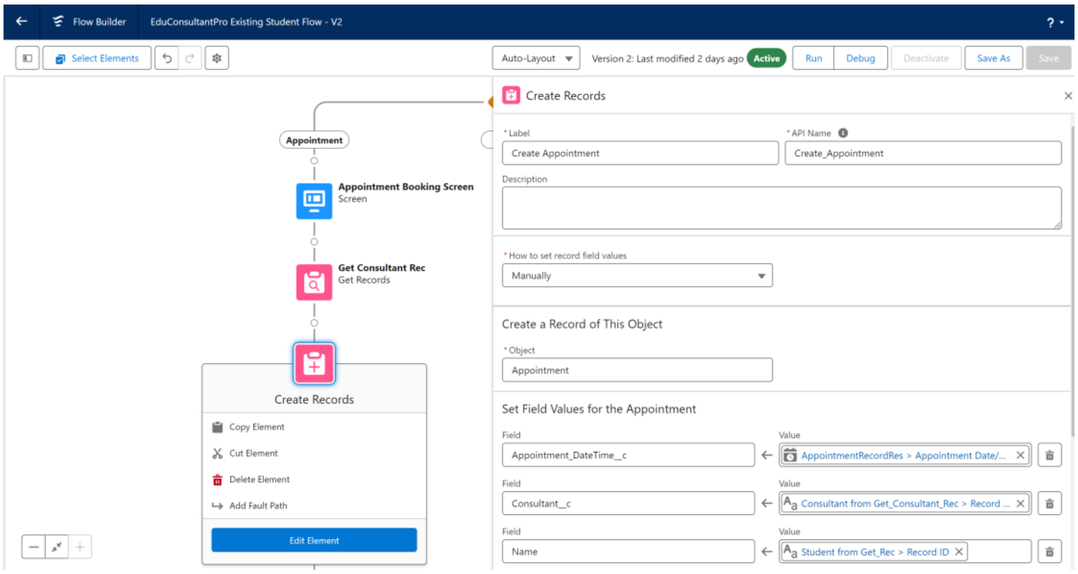
    Field: PurposeTopic__c

    Value: {!AppointmentRecordRes.PurposeTopic__c}

    Field: Student_Name__c

Value: {!Get_Rec.Id}

5. Click Done.



h) Add Screen Element

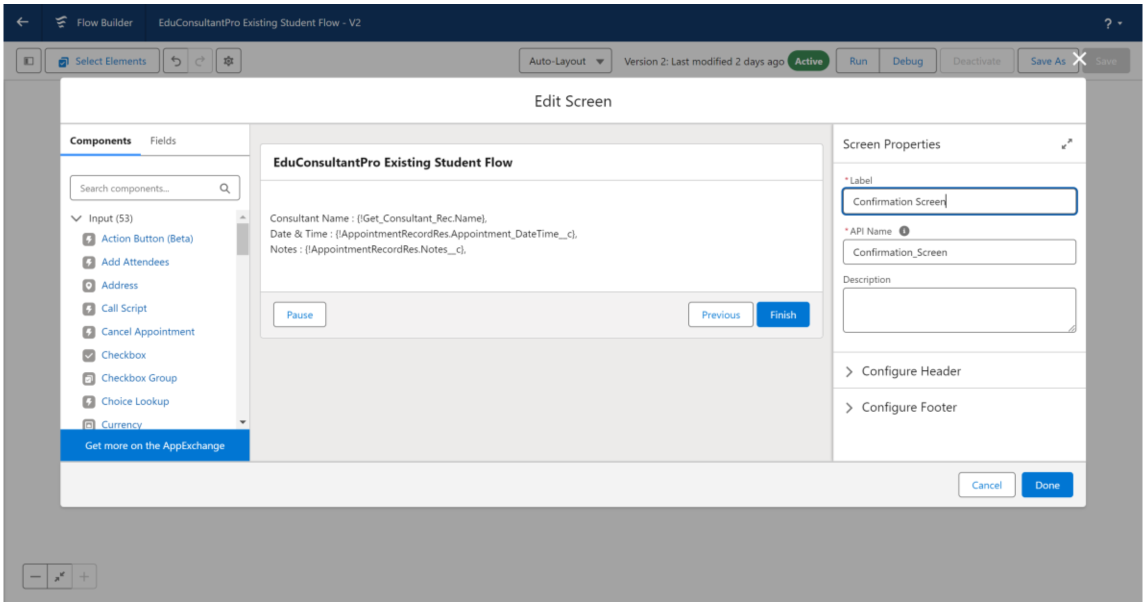
1. After the Send Email to Student action element, drag a Screen element onto the canvas.
2. Label: Enter Confirmation Screen.
3. From the left side panel, search for the Display Text component and drag it into the main panel.
4. Label: Enter Appointment_Confirmation.
5. In the Resource picker box, paste the following text:

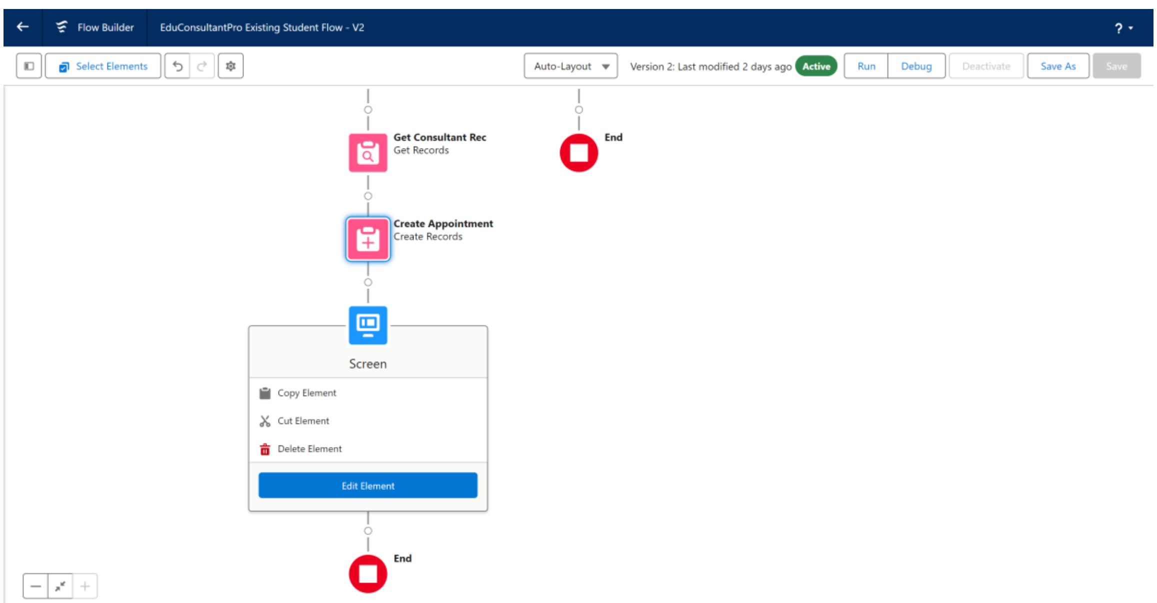
   Consultant Name: {!Get_Consultant_Rec.Name},

   Date & Time: {!AppointmentRecordRes.Appointment_DateTime__c},

   Notes: {!AppointmentRecordRes.Notes__c},

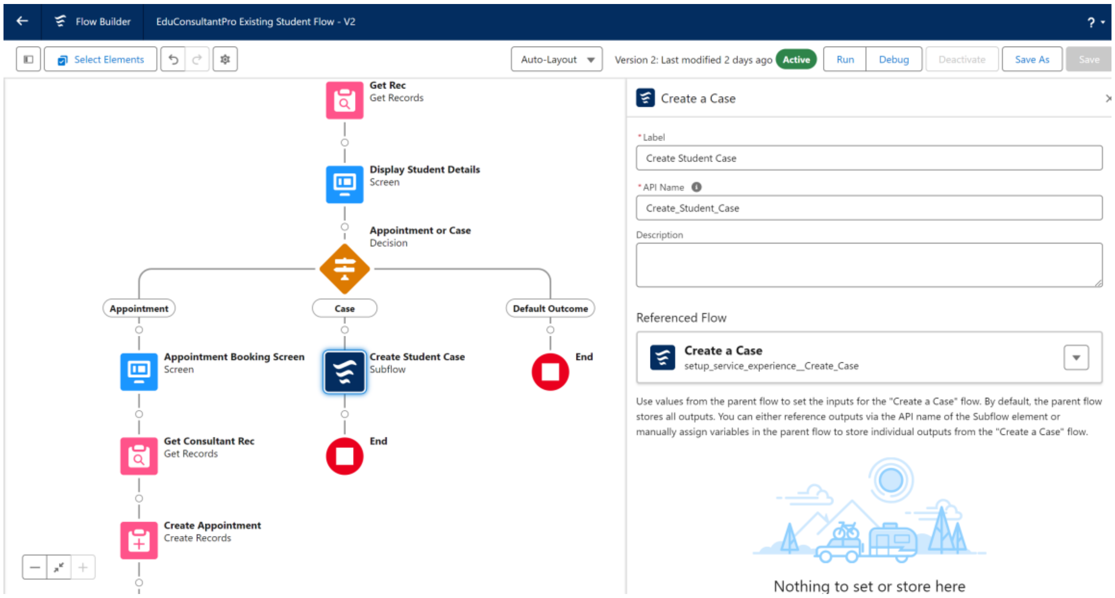
6. Click Done.





i) Add an SubFlow Element

1. After the Decision Element on the Case path, drag a Subflow element onto the canvas.
2. Search and Select: In the SubFlow search box, find and select the flow labeled "Create a Case".
3. Label: Enter Create Student Case.
4. Click Save.
5. Flow Label: Enter EduConsultantPro Existing Student Flow.
6. Click Save again to finalize.



TASK 12: CREATE A SCREENFLOW TO COMBINE ALL THE FLOWS AT ONE PLACE

a) Add Screen Element

1. From Setup, enter Flow Builder in the Quick Find box and select Flow Builder.
2. Click New Flow and select Screen Flow.
3. In your flow, drag a Screen element onto the canvas.
4. Set the Label to Welcome Screen.
5. In the left side panel, search for the Display Text component.
6. Drag the Display Text component to the main panel.
7. Set the Label to SuccessMessage.
8. In the Resource Picker box, paste the following message:

“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.

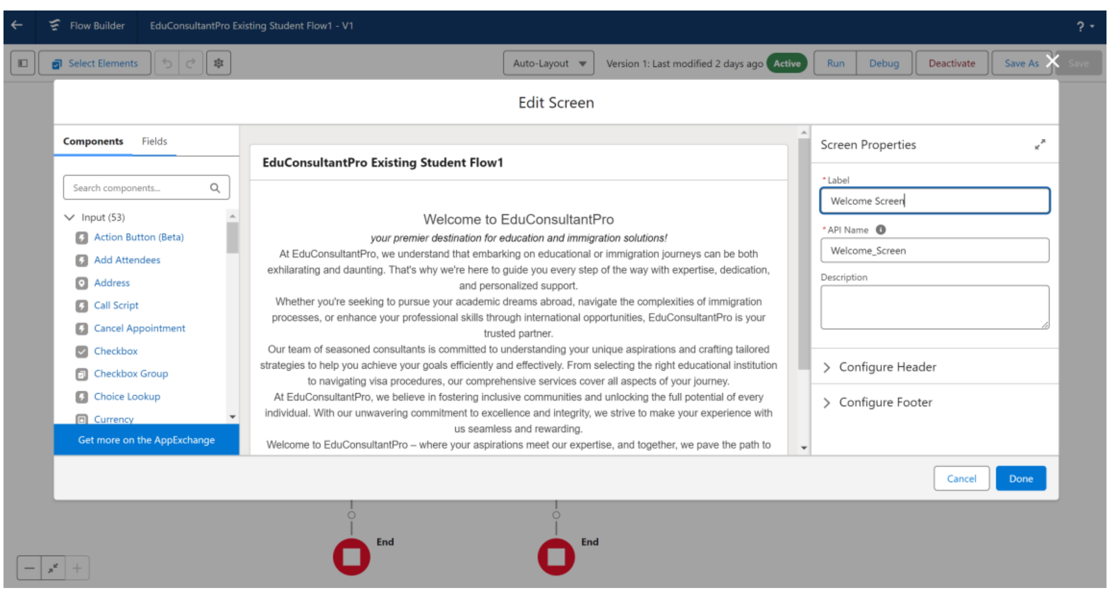
Whether you're seeking to pursue your academic dreams abroad, navigate the complexities of immigration processes, or enhance your professional skills through international opportunities, EduConsultantPro is your trusted partner.

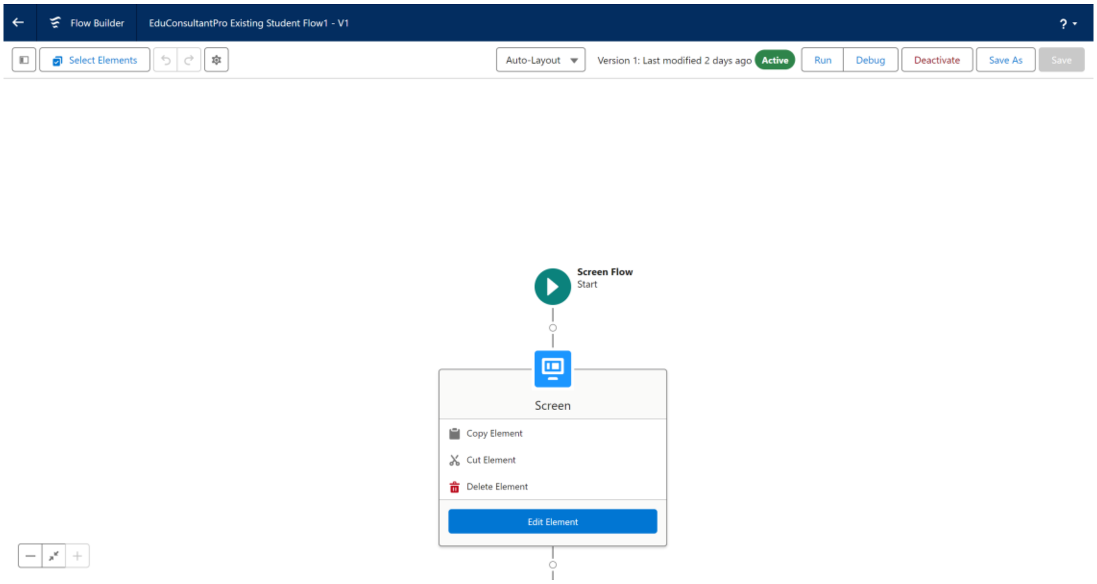
Our team of seasoned consultants is committed to understanding your unique aspirations and crafting tailored strategies to help you achieve your goals efficiently and effectively. From selecting the right educational institution to navigating visa procedures, our comprehensive services cover all aspects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

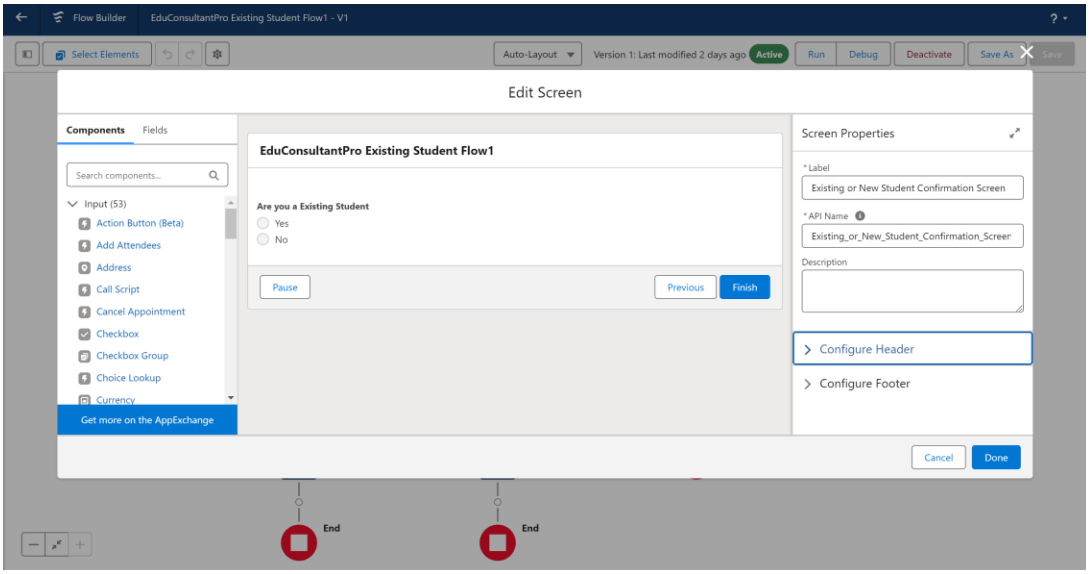
9. Click Done to finalize the configuration.

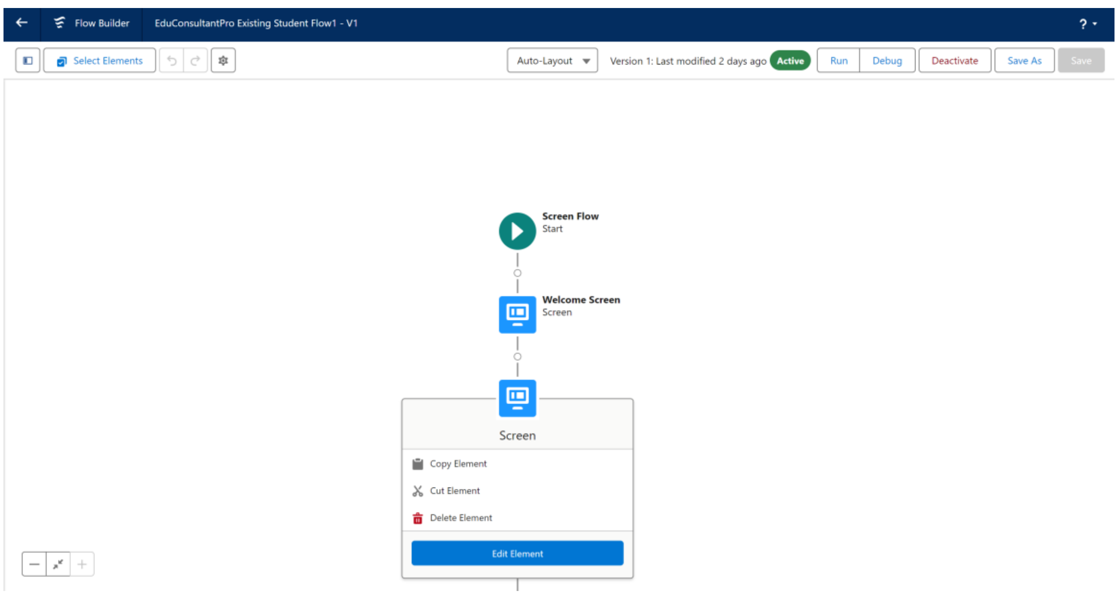




b) Add Screen Element

1. In your flow, drag a Screen element onto the canvas.
2. Place this element after the Welcome Screen element.
3. Set the Label to Existing or New Student Confirmation Screen.
4. In the left side panel, search for the Radio Button component.
5. Drag the Radio Button component to the main panel.
6. Set the Label for the Radio Button to Are you an Existing Student?.
7. Click on Add Choice.
8. Create the 'Yes' Choice:
   In the input field, type Yes.
   Click Create Yes choice.
9. Create the 'No' Choice:
   Repeat the steps for adding a choice.
   In the input field, type No.
   Click Create No choice.
10. After adding both the Yes and No choices, click Done to finalize the configuration.





c) Add Decision Element

1. Drag a Decision element onto the canvas after the Existing or New Student Confirmation Screen element.
2. Set the Label to Decision 1.
3. Configure the Outcome for Existing Students:

   Under Outcome Label, enter If Existing Student.

   For the Resource, select {!Are_you_a_Existing_Student} (this should be the variable for the radio button choice).

   Set the Operator to Equals.

For the Value, enter Yes (this is the value for the existing student choice).

4. Add Additional Outcome for New Students:

    Click the + icon to add another outcome.

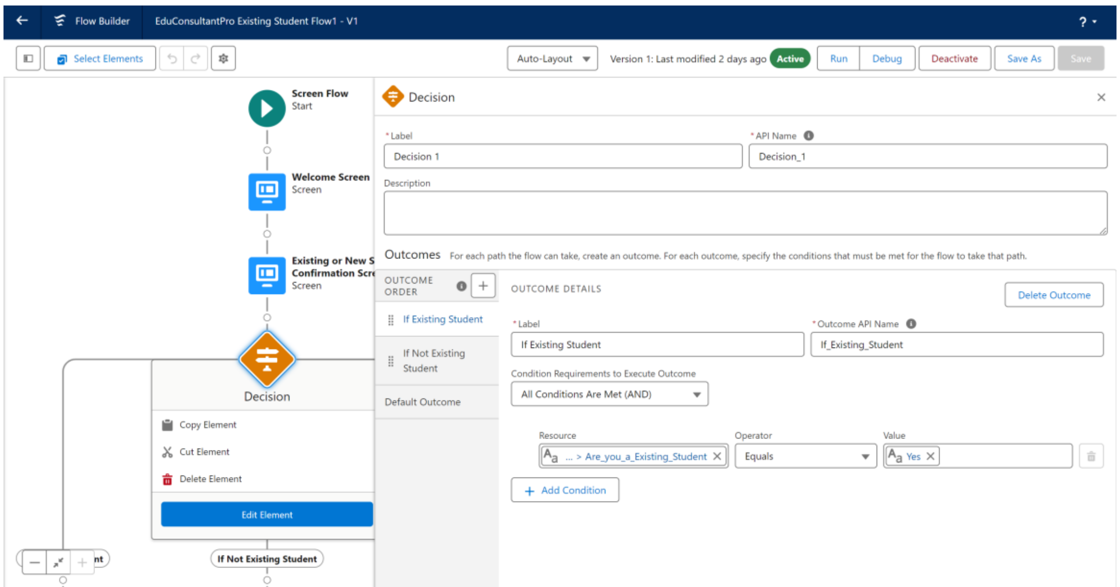
    Enter If New Student for the Outcome Label.

    For the Resource, select {!Are_you_a_Existing_Student}.

    Set the Operator to Equals.

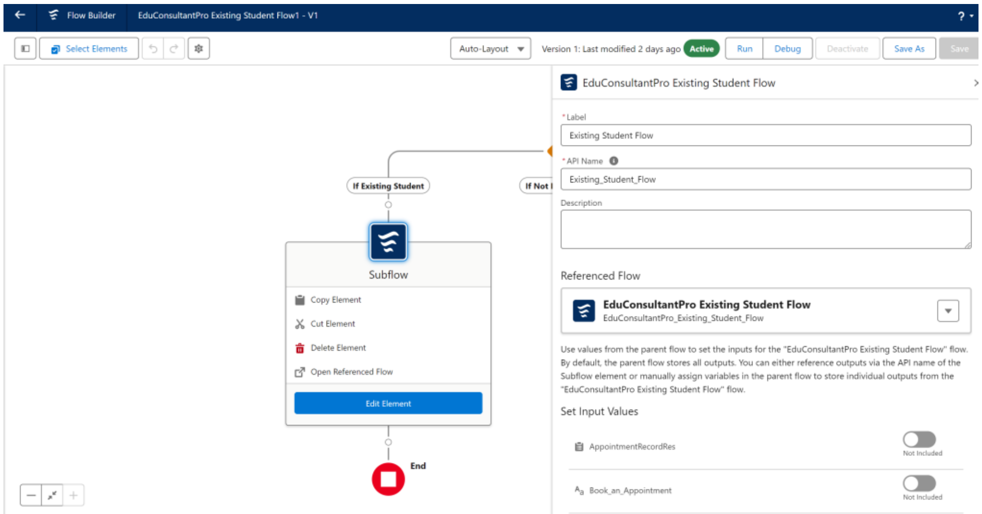
    For the Value, enter No (this is the value for the new student choice).

5. After configuring the outcomes, click Done to save the Decision element.



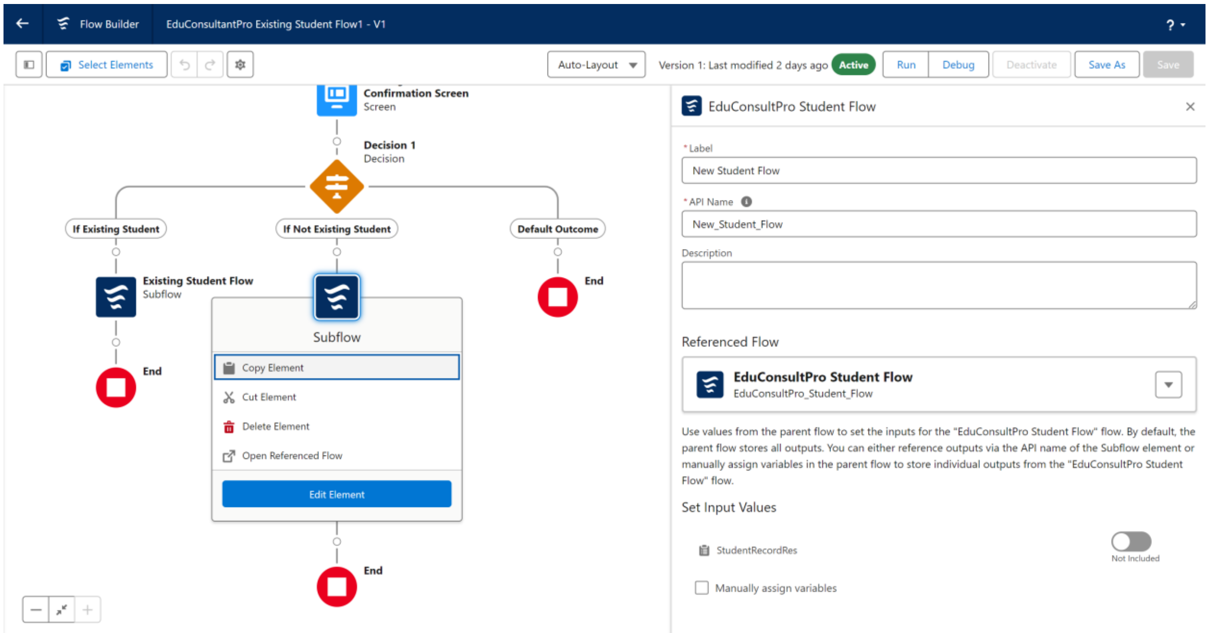
d) Add an SubFlow Element

1. Drag a Subflow element onto the canvas after the Decision 1 element on the "If Existing Student" path.
2. Set the Label to Existing Student Flow.
3. In the Subflow element settings, search for and select EduConsultantPro Existing Student Flow from the list of available subflows.
4. Set up any necessary input or output parameters based on how the EduConsultantPro Existing Student Flow is designed.
5. Click Save to ensure all changes are recorded.
6. After configuring the subflow element, click Done to save your changes.



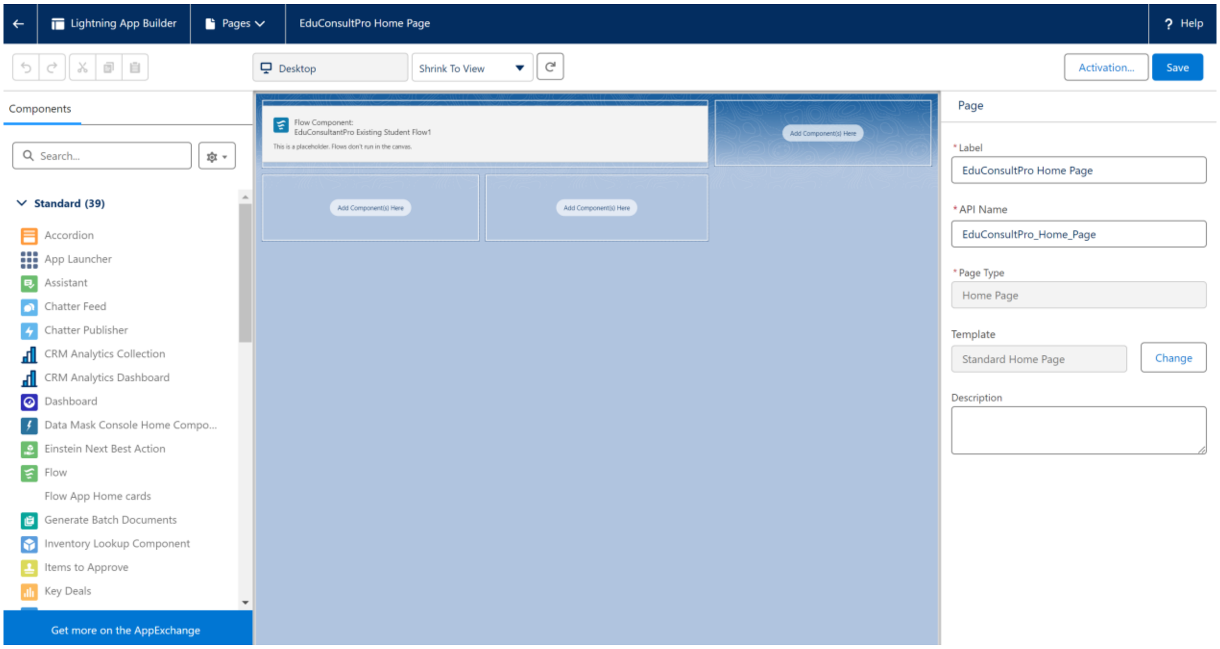
e) Add another SubFlow Element

1. Drag a Subflow element onto the canvas after the Decision 1 element on the "If Not Existing Student" path.
2. Set the Label to New Student Flow.
3. In the Subflow element settings, search for and select EduConsultantPro Student Flow from the list of available subflows.
4. Set up any necessary input or output parameters based on how the EduConsultantPro Student Flow is designed.
5. Click Save to ensure all changes are recorded.
6. After configuring the subflow element, click Done to save your changes.
7. Click on Save and name the flow as EduConsultPro Flow.
8. After saving, click on Activate to make the flow available for use.



TASK 13: CREATE A LIGHTNING APP PAGE

1. From Setup, App Builder in the Quick Find box, then select Lightning App Builder.
2. Click New.
3. Select Home Page and click Next.
4. Name the page EduConsultPro Home Page.
5. Select the Standard Home Page template.
6. Click Done.
7. Drag the Flow component from the left panel to the top-right region of the page.
8. In the Flow component's properties pane, search for and select the EduConsultPro Flow.
9. Click Save.
10. Click Activate.
11. Click App and Profile.
12. Select Sales app, then click Next.
13. Scroll down and select the System Administrator profile.
14. Click save.



Lightning App Builder
Pages
EduConsultPro Home Page
Help
Desktop
Shrink To View
Activation...
Save
Components
Search...
Standard (39)
Accordion
App Launcher
Assistant
Chatter Feed
Chatter Publisher
CRM Analytics Collection
CRM Analytics Dashboard
Dashboard
Data Mask Console Home Compo...
Einstein Next Best Action
Flow
Flow App Home cards
Generate Batch Documents
Inventory Lookup Component
Items to Approve
Key Deals
Get more on the AppExchange
Page
Label
EduConsultPro Home Page
API Name
EduConsultPro_Home_Page
Page Type
Home Page
Template
Standard Home Page
Change
Description

THANK YOU