



Project Title: A CRM Application to Manage the Services offered by an Institution

Park College Of Engineering And Technology

Code: **7122**

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Project Abstract

The project involved developing a Salesforce CRM application for EduConsultPro Institute, aimed at improving the management of student admissions, consulting requests, and immigration cases. The system enabled prospective students to submit admission applications online, with data automatically captured in Salesforce and automated email notifications sent to applicants. The project also included managing consulting services, where students could request consultations, and consultants were notified to schedule and manage appointments within the CRM. Additionally, an immigration case management system was implemented to efficiently log, process, and track cases, with automated notifications for agents and robust document management features. This solution significantly streamlined operations and enhanced the overall experience for both students and staff at EduConsultPro.

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Subtask 1: Create A Lightning App Page



INTRODUCTION

EduConsultPro Institute, a prominent educational institution, offers a diverse array of courses and programs to students from various backgrounds. With the institute's increasing popularity, managing the growing number of student admissions, consulting requests, and immigration cases became a significant challenge. To overcome these operational inefficiencies, EduConsultPro embarked on a project to implement a robust Customer Relationship Management (CRM) system using Salesforce.

The project's primary objective was to streamline and automate the institute's core administrative processes. For admission application management, the goal was to enable prospective students to submit their applications through the institute's online portal. This information would be captured directly into the Salesforce CRM, ensuring efficient data handling. Additionally, automated email notifications were set up to acknowledge successful submissions, and tools were provided to admissions staff for generating insightful reports and dashboards, allowing for a deeper analysis of application metrics, acceptance rates, and enrollment trends.

In terms of consulting services management, the project focused on creating a seamless process where students could request consulting services via the institute's website. These requests would be recorded in Salesforce, triggering automated notifications to consultants who could then schedule and manage appointments within the CRM. This ensured that the scheduling process was organized, and the status of each appointment, whether scheduled, completed, or canceled, was tracked effectively.

Another critical component was the implementation of an immigration case management system. Students could initiate immigration cases through various channels such as phone, email, or web. These cases were then logged into Salesforce, with immigration agents receiving immediate notifications to take action. The system also included tools for tracking case statuses and managing related documents, ensuring that every case was processed efficiently and transparently.

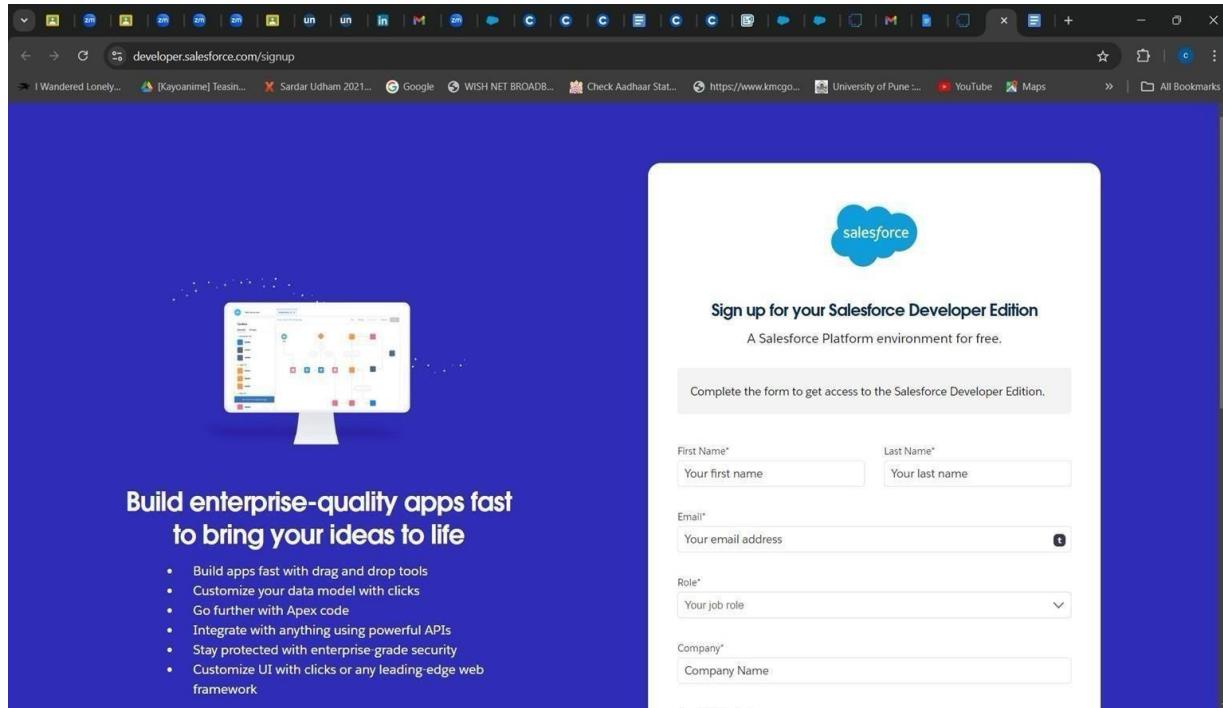
This comprehensive Salesforce solution not only addressed the immediate operational needs of EduConsultPro but also set the foundation for future scalability, enabling the institution to provide an enhanced and streamlined experi

1



TASK 1: Creating Developer Account

1. Go to <https://developer.salesforce.com/signup>
2. Fill up form with personal information



TASK 2: Account Activation

1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account.

2. Give a password and answer a security question and click on change password.
3. Then you will redirect to your salesforce setup page.



New tab

Inbox (1,139) - muthurishwin130@gmail.com

Welcome to Salesforce: Verify your account

developer@salesforce.com <developer@salesforce.com>

to me ▾

15 Nov 2024, 18:25 (3 days ago)

Compose

Inbox 1,121

Starred

Snoozed

Sent

Drafts

More

Labels

Search mail

Thanks for signing up with Salesforce!

Click below to verify your account.

Verify Account

21:30 ENG IN 18-11-2024

This screenshot shows a Gmail inbox with 1,139 messages. A specific email from developer@salesforce.com is selected, which is a verification email. The email header includes the recipient's name and the date it was received. The main content of the email is a welcome message from Salesforce, followed by a large blue button labeled 'Verify Account'. The Gmail interface includes a sidebar with labels like 'Compose', 'Inbox', and 'Starred', and a search bar at the top. The taskbar at the bottom of the screen shows various application icons.

The screenshot shows the Salesforce Setup Home page. On the left, there's a sidebar with links like 'Setup Home', 'Service Setup Assistant', 'Commerce Setup Assistant', etc. The main area has three cards: 'Get Started with Einstein Bots', 'Mobile Publisher', and 'Real-time Collaborative Docs'. Below these is a section titled 'Most Recently Used' with a table showing custom field definitions for a 'Student' object.

| NAME | TYPE | OBJECT |
|------------------|-------------------------|---------|
| Dipanwita Singha | User | |
| Address | Custom Field Definition | Student |
| Phone | Custom Field Definition | Student |
| Year of Passing | Custom Field Definition | Student |
| Gender | Custom Field Definition | Student |
| Qualification | Custom Field Definition | Student |
| First Name | Custom Field Definition | Student |
| Date of Birth | Custom Field Definition | Student |
| Last Name | Custom Field Definition | Student |
| University Name | Custom Field Definition | Student |



TASK 3: Create Objects from Spreadsheet

This task involves directly creating objects in Salesforce by importing data from spreadsheets and establishing relationships between them.

Subtask 1: Create Course Object

1. Navigate to **Object Manager**.
2. Click on **Create Object from Spreadsheet**.

Student - Skill Wallet X SI-4187-172311894 X Object Manager | Salesforce X +

https://heritageinstituteoftech-10c-dev-ed.lightning.force.com/lightning/setup/ObjectManager/home

Setup Home Object Manager

Object Manager

SETUP Object Manager 51+ Items, Sorted by Label

Quick Find Schema Builder Create

Last Modified Custom Object Custom Object from Spreadsheet

| LABEL | API NAME | TYPE | DESCRIPTION | LAST MODIFIED |
|-----------------------------|--------------------------|-----------------|-------------|---------------|
| Account | Account | Standard Object | | |
| Activity | Activity | Standard Object | | |
| Address | Address | Standard Object | | |
| Alternative Payment Method | AlternativePaymentMethod | Standard Object | | |
| API Anomaly Event Store | ApiAnomalyEventStore | Standard Object | | |
| Appointment | Appointment_c | Custom Object | | 08/08/2024 ✓ |
| Appointment Category | AppointmentCategory | Standard Object | | |
| Appointment Invitation | AppointmentInvitation | Standard Object | | |
| Appointment Invitee | AppointmentInvitee | Standard Object | | |
| Appointment Topic Time Slot | AppointmentTopicTimeSlot | Standard Object | | |
| Asset | Asset | Standard Object | | |
| Asset Action | AssetAction | Standard Object | | |
| Asset Action Source | AssetActionSource | Standard Object | | |

28°C Clear https://object-creator.salesforce.com Search 18-08-2024 22:10 ENG IN

9



3. Upload the spreadsheet to Salesforce.

4. Map the fields from the spreadsheet to the object fields.

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 * Field Labels Row
 Enter manually Detect from row 1

Import 2 rows of Data? No, skip import Yes, import data

Record Name Field Let Salesforce Create a Default

| IMPORT FILE FIELD NAME | SALESFORCE FIELD NAME | SALESFORCE FIELD TYPE | ADD TO LAYOUTS | FIELD PREVIEW |
|------------------------|-----------------------|-----------------------|-------------------------------------|---------------|
| ✓ Address | Address | Text | <input checked="" type="checkbox"/> | Hyderabad |
| ✓ City | City | Text | <input checked="" type="checkbox"/> | Hyderabad |
| ✓ Phone | Phone | Phone | <input checked="" type="checkbox"/> | 1234567890 |
| ✓ Qualification | Qualification | Text | <input checked="" type="checkbox"/> | M.Sc |
| ✓ University Name | University Name | Text | <input type="checkbox"/> | BHIT |
| ✓ Year of Passing | Year of Passing | Date | <input type="checkbox"/> | 2020 |

Back Next



5. Define the Object properties

Create a custom object from a spreadsheet

Object properties

Almost finished! Time to define your object's attributes.

* Label

* Plural Label

* API Name ⓘ

Object Description

> Advanced Settings

Back Finish

6. Following the same steps create the following objects:

a. Consultant

b. Student

c. Appointment

d. Registration



The screenshot shows the Salesforce Object Manager interface. At the top, there are tabs for Setup, Home, and Object Manager. The main area is titled "Object Manager" with the sub-header "50+ Items. Sorted by Last Modified". Below this is a search bar with "Quick Find" and "Schema Builder" buttons, and a "Create" button. A toolbar with various icons is at the top right. The main content is a table with columns: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The rows list various objects: Registration, Consultant, Course, Student, Appointment, Work Type Group Member, Work Type Group, Work Type, Work Step Template, Work Step, Work Plan Template Entry, and Work Plan Template. The "Appointment" row is highlighted with a red border.

| LABEL | API NAME | TYPE | DESCRIPTION | LAST MODIFIED | DEPLOYED |
|--------------------------|-----------------------|-----------------|-------------|---------------|----------|
| Registration | Registration__c | Custom Object | | 08/08/2024 | ✓ |
| Consultant | Consultant__c | Custom Object | | 08/08/2024 | ✓ |
| Course | Course__c | Custom Object | | 08/08/2024 | ✓ |
| Student | Student__c | Custom Object | | 08/08/2024 | ✓ |
| Appointment | Appointment__c | Custom Object | | 08/08/2024 | ✓ |
| Work Type Group Member | WorkTypeGroupMember | Standard Object | | | |
| Work Type Group | WorkTypeGroup | Standard Object | | | |
| Work Type | WorkType | Standard Object | | | |
| Work Step Template | WorkStepTemplate | Standard Object | | | |
| Work Step | WorkStep | Standard Object | | | |
| Work Plan Template Entry | WorkPlanTemplateEntry | Standard Object | | | |
| Work Plan Template | WorkPlanTemplate | Standard Object | | | |

Subtask 2: Create Relationships Among the Objects

1. Create a **Lookup relationship between Appointment and Student Object**

- a. Go to the Appointment object and create a new custom field from **Fields & Relationships** and choose the field type **Lookup relationship**



Setup Home Object Manager ▾

SETUP > OBJECT MANAGER Appointment

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

① Auto Number

A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

② 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.

③ 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.

④ Lookup Relationship

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.

⑤ 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.

⑥ External Lookup Relationship

Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

b. Choose the related object for the relationship as Student

SETUP > OBJECT MANAGER Appointment

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Appointment New Relationship Step 2

Select the other object to which this object is related.

Related To: Student

Help for this Page

Previous Next Cancel

2. In the same way create **Lookup relationship between the following:**

- **Appointment and Student Object**

- **Student and Case Object**

1



The Lookup relationship **Student** and **Case Object** is to manage student queries related to immigration or visa applications.

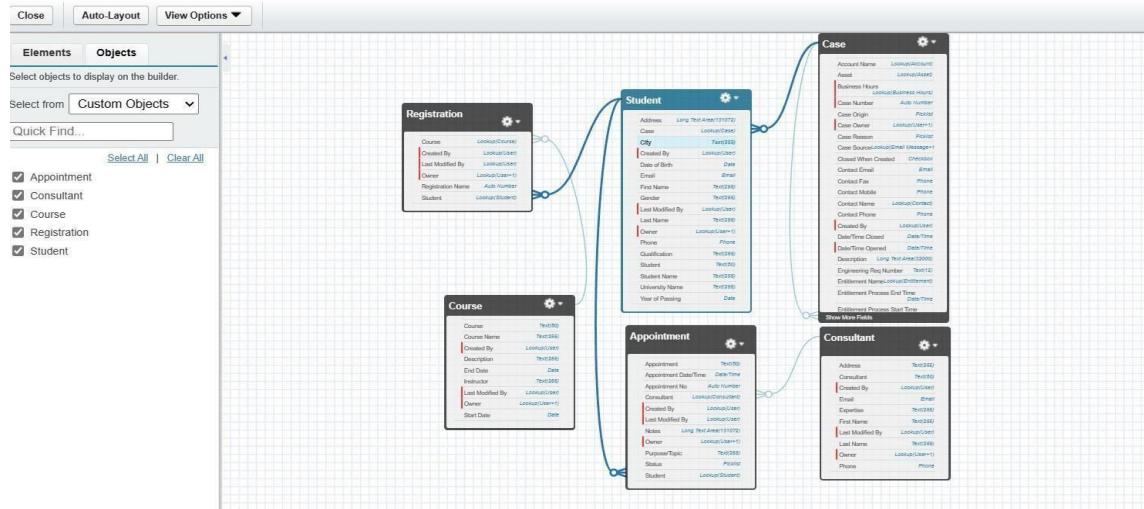
3. Go to the **Schema Builder** to see the relationship between the objects.

The screenshot shows the Salesforce Object Manager interface. At the top, there's a navigation bar with icons for Setup, Home, and Object Manager. Below it is a search bar labeled "Search Setup". On the right side of the header, there are various buttons and links, including "Schema Builder" which is highlighted with a red box. The main area displays a table of objects with columns for Label, API Name, Type, Description, Last Modified, and Deployed. The table includes rows for Account, Activity, Address, Alternative Payment Method, API Anomaly Event Store, and Appointment.

| LABEL | API NAME | TYPE | DESCRIPTION | LAST MODIFIED | DEPLOYED |
|----------------------------|--------------------------|-----------------|-------------|---------------|----------|
| Account | Account | Standard Object | | | |
| Activity | Activity | Standard Object | | | |
| Address | Address | Standard Object | | | |
| Alternative Payment Method | AlternativePaymentMethod | Standard Object | | | |
| API Anomaly Event Store | ApiAnomalyEventStore | Standard Object | | | |
| Appointment | Appointment_c | Custom Object | | 08/08/2024 | ✓ |

4. The data model will look like this:

Schema Builder



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Subtask 3: Configure the Case Object

1. Navigate to **Object Manager**, then select the **Case** object.
2. Edit the **Type** field and add the following values:

Immigration •
Visa Application

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. Under the 'Case' object, the 'Fields & Relationships' section is displayed. A red box highlights the 'Type' field, which is defined as a Picklist field of type 'Text(255)'. Other fields listed include Product, Service Contract, SLA Violation, Status, Stopped, Stopped Since, Subject, Web Company, Web Email, Web Name, and Web Phone.

| Field | Type | Description |
|------------------|-------------------|--------------------------|
| Product | Productid | Lookup(Product) |
| Service Contract | ServiceContractid | Lookup(Service Contract) |
| SLA Violation | SLAViolation_c | Picklist |
| Status | Status | Picklist |
| Stopped | IsStopped | Checkbox |
| Stopped Since | StopStartDate | Date/Time |
| Subject | Subject | Text(255) |
| Type | Type | Picklist |
| Web Company | SuppliedCompany | Text(80) |
| Web Email | SuppliedEmail | Email |
| Web Name | SuppliedName | Text(80) |
| Web Phone | SuppliedPhone | Text(40) |



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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
- Record Types
- Related Lookup Filters
- Search Layouts

Active picklist values 7 (1,000 max)
Inactive picklist values 0

Field Dependencies [New] Field Dependencies Help ?
No dependencies defined.

Validation Rules [New] Validation Rules Help ?
No validation rules defined.

Case Type Picklist Values [New] [Reorder] [Replace] [Printable View] [Chart Colors ▾] Case Type Picklist Values Help ?
Action Values API Name Default Chart Colors Modified By
Edit | Del | Deactivate Mechanical Mechanical Assigned dynamically Dipanwita Singh 07/08/2024, 10:50 pm
Edit | Del | Deactivate Electrical Electrical Assigned dynamically Dipanwita Singh 07/08/2024, 10:50 pm
Edit | Del | Deactivate Electronic Electronic Assigned dynamically Dipanwita Singh 07/08/2024, 10:50 pm
Edit | Del | Deactivate Structural Structural Assigned dynamically Dipanwita Singh 07/08/2024, 10:50 pm
Edit | Del | Deactivate Other Other Assigned dynamically Dipanwita Singh 07/08/2024, 10:50 pm
Edit | Del | Deactivate Immigration Immigration Assigned dynamically Dipanwita Singh 08/08/2024, 1:33 am
Edit | Del | Deactivate Visa Application Visa Application Assigned dynamically Dipanwita Singh 08/08/2024, 1:33 am

3. Edit the **Status** field and add the following values:

- Open
- In-progress

Setup Home Object Manager ▾

SETUP > OBJECT MANAGER
Case

Details

Fields & Relationships 2 Items, Sorted by Field Label

Search Setup New Deleted Fields Field Dependencies Set History Tracking

| FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED |
|------------------|-----------------|-----------|-------------------|---------|
| Milestone Status | MilestoneStatus | Text(30) | | |
| Status | Status | Picklist | | ✓ |



SETUP > OBJECT MANAGER
Case

| Field Dependencies | | | | | | Field Dependencies Help ? |
|------------------------------|-------------|-------------|-------------------------------------|-------------------------------------|----------------------|--|
| No dependencies defined. | | | | | | |
| Validation Rules | | | | | | Validation Rules Help ? |
| No validation rules defined. | | | | | | |
| Case Status Picklist Values | | | | | | Case Status Picklist Values Help ? |
| Action | Values | API Name | Closed | Default | Chart Colors | Modified By |
| Edit Deactivate | New | New | <input type="checkbox"/> | <input checked="" type="checkbox"/> | Assigned dynamically | Dipanwita Singha, 07/08/2024, 10:50 pm |
| Edit Del Deactivate | Working | Working | <input type="checkbox"/> | <input type="checkbox"/> | Assigned dynamically | Dipanwita Singha, 07/08/2024, 10:50 pm |
| Edit Del Deactivate | Escalated | Escalated | <input type="checkbox"/> | <input type="checkbox"/> | Assigned dynamically | Dipanwita Singha, 07/08/2024, 10:50 pm |
| Edit Del Deactivate | Closed | Closed | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Assigned dynamically | Dipanwita Singha, 07/08/2024, 10:50 pm |
| Edit Del Deactivate | Open | Open | <input type="checkbox"/> | <input type="checkbox"/> | Assigned dynamically | Dipanwita Singha, 08/08/2024, 1:32 am |
| Edit Del Deactivate | In-progress | In-progress | <input type="checkbox"/> | <input type="checkbox"/> | Assigned dynamically | Dipanwita Singha, 08/08/2024, 1:32 am |

Subtask 4: Create a Lightning App

1. In **Setup**, search for **App Manager** in the Quick Find bar.
2. Click on **New Lightning App**.

Setup Home Object Manager

Q app manager

Apps **App Manager**

Didn't find what you're looking for?
Try using Global Search.

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

| App Name ↑ | Developer Name | Description | Last Modified ... | Ap... ↴ | Vi... ↴ |
|-----------------------|----------------|---|----------------------|-----------|---------|
| 1 All Tabs | AllTabSet | | 07/08/2024, 10:50 pm | Classic | ▼ |
| 2 Analytics Studio | Insights | Build CRM Analytics dashboards and apps | 07/08/2024, 10:50 pm | Classic | ✓ |
| 3 App Launcher | AppLauncher | App Launcher tabs | 07/08/2024, 10:50 pm | Classic | ✓ |
| 4 Automation | FlowsApp | Automate business processes and repetitive tasks. | 07/08/2024, 10:53 pm | Lightning | ✓ |
| 5 Bolt Solutions | LightningBolt | Discover and manage business solutions designed for your industry. | 07/08/2024, 10:52 pm | Lightning | ✓ |
| 6 Community | Community | Salesforce CRM Communities | 07/08/2024, 10:50 pm | Classic | ✓ |
| 7 Content | Content | Salesforce CRM Content | 07/08/2024, 10:50 pm | Classic | ✓ |
| 8 Data Manager | DataManager | Use Data Manager to view limits, monitor usage, and manage recipes. | 07/08/2024, 10:50 pm | Lightning | ✓ |
| 9 Digital Experiences | SalesforceCMS | Manage content and media for all of your sites. | 07/08/2024, 10:50 pm | Lightning | ✓ |

New Lightning App New Connected App

3. Name the app **EduConsultPro.** 17



Salesforce

Search Setup

New Lightning App

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 Name

* Developer Name

Description

App Branding

Image Primary Color Hex Value

Org Theme Options Use the app's image and color instead of the org's custom theme

Next

12 Marketing CRM Classic Marketing Track sales and marketing efforts with CRM objects. 07/08/2024, 10:50 pm Classic

13 Platform Platform The fundamental Lightning Platform 07/08/2024, 10:50 pm Classic

The screenshot shows the "New Lightning App" setup screen in the Salesforce interface. It includes sections for "App Details" and "App Branding". In the "App Details" section, fields are filled with "EduConsultPro" for both "App Name" and "Developer Name". A "Description" field contains the placeholder "Enter a description...". In the "App Branding" section, there is a placeholder image box with an "Upload" button and a primary color hex value set to "#0070D2". Below these sections are "Org Theme Options" checkboxes. At the bottom, a progress bar indicates steps 12 and 13, with step 13 currently selected. Step 12 is described as "Marketing CRM Classic" and step 13 as "Platform". The status for step 13 is "The fundamental Lightning Platform" with a timestamp of "07/08/2024, 10:50 pm" and a "Classic" theme.

4. Add the following items from the Available Items list to the Selected Items list:

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



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New Lightning App

Navigation Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

| Available Items | Selected Items |
|-----------------------------|----------------|
| Home | Home |
| Accounts | Students |
| All Sites | Courses |
| Alternative Payment Methods | Consultants |
| Analytics | Appointments |
| App Launcher | Registrations |
| Appointment Categories | Cases |

Back Next

12 Marketing CRM Classic Marketing Track sales and marketing efforts with CRM objects. 07/08/2024, 10:50 pm Classic

13 Platform Platform The fundamental Lightning Platform 07/08/2024, 10:50 pm Classic

5. Add the **System Administrator** profile from Available Profiles to Selected Profiles and click **Save & Finish**.

New Lightning App

User Profiles

Choose the user profiles that can access this app.

| Available Profiles | Selected Profiles |
|-------------------------------------|----------------------|
| Analytics Cloud Integration User | System Administrator |
| Analytics Cloud Security User | |
| Authenticated Website | |
| Authenticated Website | |
| B2B Reordering Portal Buyer Profile | |
| Contract Manager | |

Back Save & Finish

12 Marketing CRM Classic Marketing Track sales and marketing efforts with CRM objects. 07/08/2024, 10:50 pm Classic

13 Platform Platform The fundamental Lightning Platform 07/08/2024, 10:50 pm Classic

14 Queue Management QueueManagement Create and manage queues for your business. 07/08/2024, 10:50 pm Lightning ✓



6. EduConsultPro app is created.

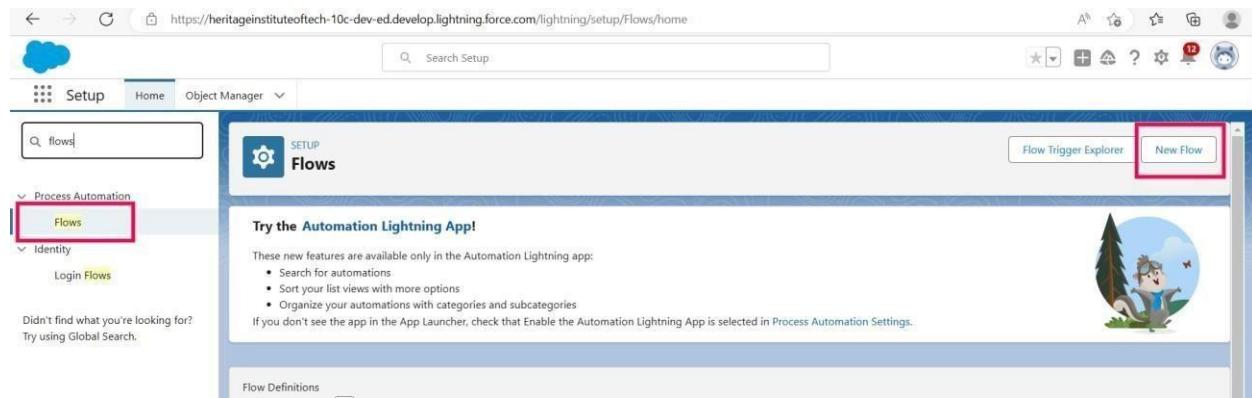
TASK 4: Create A ScreenFlow For Student Admission Application Process

Design a ScreenFlow to automate the student admission process, including data capture, record creation, course selection, and email notifications.

Subtask 1: Add Screen Element

Set up a screen to capture student information.

1. Navigate to **Setup**, enter **Flow** in the Quick Find box, and select **New Flow**. Choose **ScreenFlow**.





The screenshot shows a 'Select Type' screen in the Salesforce Flow builder. On the left, there's a sidebar with a 'Recent' section and a 'New' button. The main area is titled 'Select Type' and has a 'Recommended' section. It lists six flow types:

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

2. Add a **Screen** element.

3. In the **Screen Properties** pane:

- **Label:** Enter “Student Info”.
- **Fields:** Create a new **Resource** (StudentRecordRes) to display all fields from the **Student** object.
- **Action:** Drag and drop the necessary fields to collect student information on the screen like the Student Name, First Name, Last Name, Phone, Email, DoB, Address, City, Qualification.



Flow

mpBody

mpSub

_Dueling...

_GMAT_R...

_GRE_Re...

Edit Variable

* API Name: StudentRecordRes

Description:

* Data Type: Record

Object: Student

Availability Outside the Flow:

Available for input

Available for output

Cancel Done

← Flow Builder EduConsultPro Student Flow - V1

Select Elements Auto-Layout Version 1: Last modified 10 days ago Active Run Debug Deactivate Save As Save

Edit Screen

Components Fields

Search components...

Input (53)

- Action Button (Beta)
- Add Attendees
- Address
- Call Script
- Cancel Appointment
- Checkbox
- Checkbox Group
- Choice Lookup

Get more on the AppExchange

EduConsultPro Student Flow

Student Name

First Name

Last Name

Phone

Screen Properties

* Label: Student Info

* API Name: Student_Info

Description:

Configure Header

Configure Footer

Cancel Done

Subtask 2: Create Student Record Using Create Element

Set up a process to create a student record from the captured information.

1. Add a **Create** element after the Student Info screen element.
2. **Label:** “Create Student Record”. **22**



3. Select “**One**” under **How many records to Create**.
4. Choose “**Use all values from a record**” under **How to Set the record fields**.
5. Select the **StudentRecordRes** variable from the Student Info screen element under **Create a record from these values**.

Create Records X

| | |
|--|---|
| * Label | * API Name i |
| <input type="text" value="Create Student Record"/> | <input type="text" value="Create_Student_Record"/> |
| Description | |
| <div style="border: 1px solid #ccc; height: 40px; width: 100%;"></div> | |

* How to set record field values

How Many Records to Create

One
 Multiple

Create a Record from These Values

* Record

Make sure that ID is blank. After the flow creates the records, ID is set to match the record that was created. i

Subtask 3: Add Course Selection Screen

Provide a screen for students to select a course.



1. Add a **Screen** element after the Create Student Record element.
2. **Label:** “Course Screen”.

Edit Screen

Components Fields

picklist

▼ Input (3)

- Dependent Picklists
- Multi-Select Picklist
- Picklist

[Get more on the AppExchange](#)

EduConsultPro Student Flow

Select Course

--None--

Screen Properties

*Label

*API Name

Description

> Configure Header

> Configure Footer

3. Add a **Picklist** component:
 - **Label:** “Select Course”.
 - **Choices:** Enter “IELTS”, “GRE”, “GMAT”, “Duolingo”, and “TOEFL”.



Edit Screen

EduConsultPro Student Flow

Components Fields

picklist

Input (3)

- Dependent Picklists
- Multi-Select Picklist
- Picklist

Get more on the AppExchange

Select Course

--None--

Pause Previous Finish

← Picklist Component type Picklist

*Choice {IELTS}

*Choice {IGRE}

*Choice {IGMAT}

*Choice {IDuolingo}

*Choice {TOEFL}

Cancel Done

The screenshot shows the Salesforce 'Edit Screen' interface for the 'EduConsultPro Student Flow'. On the left, there's a sidebar with 'Components' selected, showing a list of input types: 'Dependent Picklists', 'Multi-Select Picklist', and 'Picklist'. Below this is a button to 'Get more on the AppExchange'. The main area displays a 'Select Course' component with a dropdown menu showing 'None'. At the bottom are 'Pause', 'Previous', and 'Finish' buttons. To the right, a modal window titled 'Picklist' is open, showing a list of choice variables: 'IELTS', 'IGRE', 'IGMAT', 'IDuolingo', and 'TOEFL', each with edit and delete icons. A red box highlights the list of choice variables.

Subtask 4: Add Decision Element

Define logic to determine which course has been selected.

1. Add a **Decision** element after the Course Screen.
2. **Label:** “Selecting Course”.
3. Define outcomes for each course:
 - **Outcome Label:** “Selected IELTS”.
 - **Condition:**
 - **Resource:** Select_Course (Screen Component from Select Course Screen Element)
 - **Operator:** Equals
 - **Value:** IELTS (Choice Variable from Select Course Screen Element) ▪

Repeat for GRE, GMAT, Duolingo, TOEFL.



Decision

* Label: Selecting Course | * API Name: Selecting_Course

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 | Delete Outcome |
|-------------------|---|-----------------|
| Selected IELTS | * Label: Selected IELTS * Outcome API Name: SelectedIELTS | |
| Selected GRE | Condition Requirements to Execute Outcome: All Conditions Are Met (AND) | |
| Selected GMAT | | |
| Selected Duolingo | | |
| Selected TOEFL | | |
| Default Outcome | Resource: Aa Course Screen > Select_Course Operator: Equals Value: Aa IELTS | + Add Condition |

Subtask 5: Add GET Record Element

Retrieve course details based on the selected course.

1. Add a **GET Record** element after each Decision path (IELTS, GRE, GMAT, etc.).
2. **Label:** “Get [Course Name] Rec”.
3. **Object:** Course
4. **Condition Requirement:** All Conditions are Met (AND)
5. **Field:** Course Name
6. **Operator:** Equals
7. **Value:** {!Select_Course}



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Get Records

* Label: Get IELTS Rec

* API Name: GetIELTSRec

Description:

Get Records of This Object

* Object: Course

Filter Course Records

Condition Requirements: All Conditions Are Met (AND)

Add Condition

Field: Name, Operator: Equals, Value: Select_Course

Sort Course Records

Sort Order

Subtask 6: Create Registration Record Using Create Records Element

Create a registration record for the selected course.

1. Add a **Create** element after each GET Record element.
2. **Label:** “Create [Course Name] Registration Rec”.
3. **How many records to Create:** “One”.
4. **How to Set the record fields:** Use separate resources, and literal values.
5. **Object:** Registration
6. Set fields:

- **Course_Name_c:** {!Get_[Course Name]_Rec.Id} ▪ **Student_Name**
- c:** {!StudentRecordRes.Id}



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Create Records

* Label: Create IELTS Registration Rec

* API Name: CreateIELTSRegistrationRec

Description:

* How to set record field values: Manually

Create a Record of This Object: Registration

Set Field Values for the Registration

| Field | Value |
|------------|--|
| Course__c | Aa Course from GetIELTSRec > Record ID X |
| Student__c | Aa StudentRecordRes > Record ID X |

+ Add Field

Subtask 7: Create Email Text Template Variables

Set up email templates for student registration confirmation.

1. Click the **toggle toolbox** on the left corner, select **New Resource**, and choose **Text Template**.
2. **API Name:** “StuRegistrationEmailTextTempBody”.
3. **Type:** View as plain text.
4. **Body:** Write a registration confirmation text.





Edit Text Template

1EmailTextTempBody

Source...

:RecordRes.Name},

Hi and welcome to EduConsultantPro!

5. We are pleased to inform you that your registration on our platform has been successfully completed. You are now part of our vibrant 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.

Repeat to create an email text template for the subject, **API Name:**

“StuRegistrationEmailTextTempSub”.



Edit Text Template

* API Name i

Description

* Body i



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.

Subtask 8: Add Action Element

Configure the action to send an email to the student.

1. Add an **Action** element after all Decision paths.
2. **Label:** “Send Email to Student”.
3. **Input Values:**

- **Body:** {!StuRegistrationEmailTextTempBody}
- **Recipient Address List:** {!StudentRecordRes.Email_c} ▪
- **Subject:** {!StuRegistrationEmailTextTempSub}

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Send Email

* Label
Send Email to Student

* API Name
Send_Email_to_Student

Description

Send Email emailSimple-emailSimple

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.

Set Input Values for the Selected Action

Add Threading Token to Body Not Included

Add Threading Token to Subject Not Included

A_a Body Included
StuRegistrationEmailTextTempBody X

Send Email

A_a Recipient Address Collection Not Included

A_a Recipient Address List Included
A_a StudentRecordRes > Email X

A_a Recipient ID Not Included

A_a Related Record ID Not Included

Rich-Text-Formatted Body Not Included

A_a Sender Email Address Not Included

A_a Sender Type Not Included

A_a Subject Included
StuRegistrationEmailTextTempSub X

Subtask 9: Add Success Screen

Display a confirmation message to the student after the registration.

1. Add a **Screen** element after the Send Email to Student Action Element.
2. **Label:** “Success Screen”.
3. Add a **Display Text** component:
 - **Label:** “SuccessMessage”.

- **Text:** Write the success message.



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Edit Screen

EduConsultPro Student Flow

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.

Pause Previous Finish

Screen Properties

*Label: Success Screen

*API Name: Success_Screen

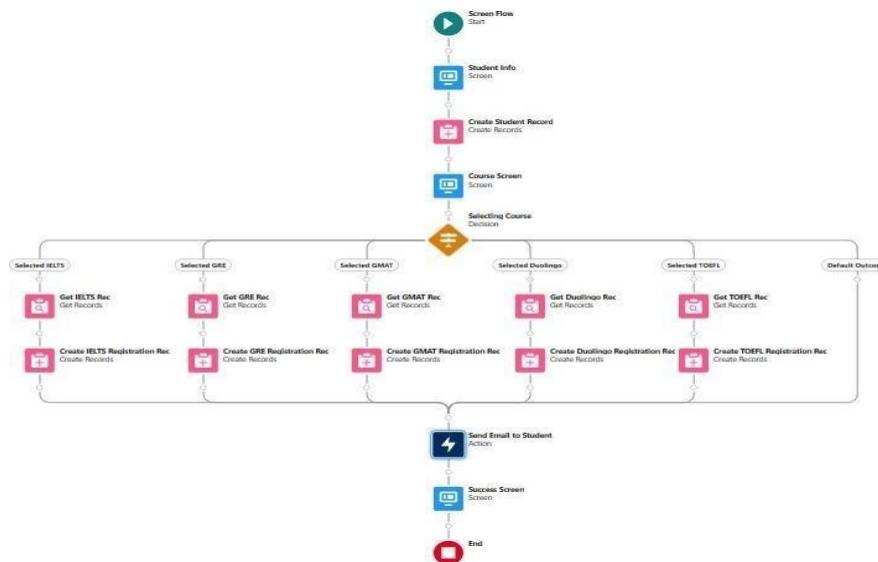
Description:

> Configure Header

> Configure Footer

Cancel Done

4. Save the flow and name it “EduConsultPro Student Flow”.



Task 5: Create Users

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Set up a new user with the Standard Platform User profile and configure the user settings.

Subtask 1: Create a User

Create a new user with the Standard Platform User profile.

1. Navigate to **Setup > Users > New User**.

The screenshot shows the Salesforce Setup interface. The left sidebar is collapsed, showing 'Users' is selected. The main area displays the 'All Users' page with a table of existing users. A red box highlights the 'New User' button at the top right of the table header. The table columns are: Action, Full Name, Alias, Username, Role, Active, and Profile. The table data includes:

| Action | Full Name | Alias | Username | Role | Active | Profile |
|---------------------------------|------------------|---------|--|------|--------|----------------------------------|
| <input type="checkbox"/> Edit | Chatter Expert | Chatter | chatty.00dns000001g1h72ac.roxSevrhfen@chatter.salesforce.com | ✓ | ✓ | Chatter Free User |
| <input type="checkbox"/> Edit | Consultant | cons | j24@gmail.com | ✓ | ✓ | Standard Platform User |
| <input type="checkbox"/> Edit | Singha_Digameita | DSing | dsingha_00j@mail.com | ✓ | ✓ | System Administrator |
| <input type="checkbox"/> Edit | User Integration | Integ | Integration@00dns000001g1h72ac.com | ✓ | ✓ | Analytics Cloud Integration User |
| <input type="checkbox"/> Edit | User Security | sec | insightssecurity@00dns000001g1h72ac.com | ✓ | ✓ | Analytics Cloud Security User |

2. Enter the following details:

- **Last Name:** Consultant
- **License:** Salesforce Platform
- **Profile:** Standard Platform User

3. Complete all mandatory fields as required and save.



The screenshot shows the Salesforce Setup interface under the 'Users' section. A search bar at the top contains the text 'users'. On the left, a sidebar lists various user management settings, with 'Users' selected. The main area displays a 'User Edit' screen for a user named 'Consultant'. The 'General Information' section includes fields for First Name, Last Name (highlighted), Alias, Email, Username, Nickname, Title, Company, Department, and Division. To the right, there are sections for 'Role' (set to '<None Specified>'), 'User License' (set to 'Salesforce Platform'), and 'Profile' (set to 'Standard Platform User'). Other settings like 'Active', 'Marketing User', 'Offline User', etc., are listed below.

Subtask 2: Configure the User Settings

Update the user settings to include the appropriate approver settings.

1. Navigate to **Setup > Administration > Users** > Locate the newly created user and click **Edit** next to their name.
2. Scroll down to the **Approver Settings** section.
3. In the **Manager Field**, select “Consultant” and save.



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The screenshot shows the 'Users' setup page in Salesforce. It includes fields for Street, City, Zip/Postal Code, State/Province, and Country (set to IN). A 'Single Sign On Information' section has a 'Federation ID' field. Under 'Locale Settings', the Time Zone is set to '(GMT+05:30) India Standard Time (Asia/Kolkata)', Locale to 'English (India)', and Language to 'English'. In the 'Approver Settings' section, 'Delegated Approver' is set to 'Manager' (with 'Consultant' selected), and 'Receive Approval Request Emails' is set to 'Only if I am an approver'. At the bottom are 'Save', 'Save & New', and 'Cancel' buttons.

Task 6: Create an Approval Process for the Property Object

Establish an approval process for the Property object, including creating necessary email templates for notifications.

Subtask 1: Create Email Templates

Create and configure email templates to be used in the approval process.

1. Navigate to **Setup**, enter **Templates** in the Quick Find box, and select **Lightning Email Templates**. Toggle on.

1



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The screenshot shows the Salesforce Setup interface. The top navigation bar includes a cloud icon, 'Setup', 'Home', and 'Object Manager'. A search bar says 'Search Setup' and a toolbar has icons for star, plus, question mark, etc. On the left, a sidebar has a 'Email' section with 'Classic Email Templates' and 'Lightning Email Templates' (which is selected). Below it is a global search bar with placeholder 'Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'Lightning Email Templates' with a sub-section 'Folders and Enhanced Sharing' containing a toggle switch labeled 'On'.

2. Go to the **App Launcher**, search for **Email Templates**, and create a new folder with the desired name.

The screenshot shows the Salesforce App Launcher. The 'Setup' tab is highlighted. A search bar at the top says 'Search Setup'. The main area shows a list under 'Items' with 'Email Templates' highlighted by a red box. To the right is a decorative background image of a cartoon character.

3. Create a new email template within the created folder:

- **Template Name:** Submission Template ▪

Write a message in the HTML Value



Edit Submission Template

* = Required Information

Information

| | | |
|---|---|--|
| <p>*Email Template Name</p> <input type="text" value="Submission Template"/> | <p>Related Entity Type</p> <div style="border: 1px solid #ccc; padding: 2px; width: fit-content;"> -- None -- </div> | |
| <p>Description</p> <div style="border: 1px solid #ccc; padding: 5px; height: 40px;"></div> | | <p>Folder</p> <div style="display: flex; align-items: center;"> <div style="flex-grow: 1; border: 1px solid #ccc; padding: 2px; margin-right: 10px;">EduConsultantpro_Email</div> Select Folder </div> |

Message Content

| | |
|---|--|
| <p>Subject</p> <input type="text" value="Appointment Request with EduConsultantpro Consulta"/> | <p>Enhanced Letterhead</p> <input type="text" value="Search Enhanced Letterheads..."/> Q |
|---|--|

HTML Value

[Cancel](#) [Save](#)

HTML Value

 Source Font Size

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 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

Save



4. Create two additional email templates:

- **Approval Template:** Similar to the Submission Template but tailored for approval notifications.
- **Rejection Template:** Similar to the Submission Template but tailored for rejection notifications.

Edit Approval Request Template

* = Required Information

Information

* Email Template Name

Approval Request Template

Related Entity Type

-- None --

Description

Folder

EduConsultantpro_Email

Select Folder

Edit Rejection Request Template

* = Required Information

Information

* Email Template Name

Related Entity Type

Description

Folder



| Email Templates | | | | | | |
|-------------------------|----------------------------|------------------------|------------------|-------------------|--------------------|--|
| Recent | | | | | | |
| 3 items | | | | | | |
| Email Templates | Email Template Name | Description | Folder | Last Modified By | Last Modified Date | |
| Recent | Approval Request Template | EduConsultantpro_Email | Dipanwita Singha | 8/8/2024, 2:22 pm | | |
| Created by Me | Submission Template | EduConsultantpro_Email | Dipanwita Singha | 8/8/2024, 2:09 pm | | |
| Private Email Templates | Rejection Request Template | EduConsultantpro_Email | Dipanwita Singha | 8/8/2024, 2:21 pm | | |
| Publish Email Templates | | | | | | |

Subtask 2: Create An Approval Process

Configure an approval process for the Appointment object to manage request approvals.

1. Navigate to **Setup**, enter **Approval** in the Quick Find box, and select **Approval Processes**.
2. In **Manage Approval Processes For**, select **Appointment**.
3. Click **Create New Approval Process** and choose **Use Jump Start Wizard**.

The screenshot shows the Salesforce Setup interface with the following details:

- Search Bar:** Search Setup
- Left Navigation:** Home, Object Manager
- Quick Find:** Q approval
- Current Page:** Approval Processes
- Section:** Approval Processes for Appointment
- Help:** Help for this Page
- Instructions:** Approvals are complex business processes that require information gathering and planning before implementing. It is recommended that you follow the instructions below before getting started.
 1. Read the help topic
 2. View the checklist
 3. Create a custom user hierarchical relationship field
 4. Create email templates
 5. Create an approval process using either the Jump Start or Standard Wizard
 6. Add Approval History Related List to all page layouts
 7. Activate the process to deploy to your users
- Manage Approval Processes For:** Appointment
- Create New Approval Process:** Use Jump Start Wizard (highlighted)
- Buttons:** Reorder
- Table Headers:** Action, Process Order, Approval Process Name, Description

4. Configure the approval process:

- **Process Name:** Appointment Approval

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

Select Approver

Using the options below, specify the user to whom the approval request should be assigned.

Let the submitter choose the approver manually.
 Automatically assign an approver using a standard or custom hierarchy field: 
 Automatically assign to queue.
 Automatically assign to approver(s).

 Because this is the Jump Start Wizard, Salesforce automatically chooses some settings for you. [Show More](#)

Save **Cancel**

5. Click **Next** and select **Manager** for the option **Automated Approver Determined By**.
6. Under **Record Editability Properties**, select **Administrators** OR the currently assigned approver can edit records during the approval process. 7. Click **Save**.

Appointment Approval

Step 3. Specify Approver Field and Record Editability Properties

When you define approval steps, you can assign approval requests to different users. One of your options is to use a user approval steps, select a field from the picklist below. Also, when a record is in the approval process, it will always be locked by the currently assigned approver to edit the record.

Select Field Used for Automated Approval Routing

Next Automated Approver Determined By  
Use Approver Field of Appointment Owner

Record Editability Properties

- Administrators **ONLY** can edit records during the approval process.
 Administrators **OR** the currently assigned approver can edit records during the approval process.



8. Click **View Approval Process Detail Page**.

9. Under **Initial Submission Actions**, click **Add New**: ▪ Select **Field Update**:

- **Field to Update:** Appointment: Status ○ **Value:** Pending

Field Update Edit

Identification

| | |
|---|--------------------------|
| Name | Submitted |
| Unique Name | Submitted |
| Description | (empty) |
| Object | Appointment |
| Field to Update | Appointment: Status |
| Field Data Type | Picklist |
| Re-evaluate Workflow Rules after Field Change | <input type="checkbox"/> |

Specify New Field Value

Picklist Options

The value above the current one
 The value below the current one
 A specific value

Buttons

Save Save & New Cancel

10. Click **Add New**:

- Select **Email Alert**:
 - **Description:** Submission Email Alert
 - **Email Template:** Submission Template ○
- Recipient Type:** Select your Name



Email Alert Edit

Save Save & New Cancel

Edit Email Alert

| | |
|---------------------|--------------------------|
| Description | Submission Email Alert |
| Unique Name | Submission_Email_Alert |
| Object | Appointment |
| Email Template | Submission Template |
| Protected Component | <input type="checkbox"/> |

Recipient Type: Search: User for: Find

Recipients

| Available Recipients | Selected Recipients |
|---|------------------------|
| User: Consultant User: Integration User User: Security User | User: Dipanwita Singha |

Add Remove

11. Repeat steps 9 and 10 for **Final Approval** and **Final Rejection** actions using the appropriate templates and values.

| Final Approval Actions  | | |
|--|--------------|--------------------------------------|
| Action | Type | Description |
| Edit | Record Lock | Lock the record from being edited |
| Edit Remove | Email Alert | Approval Email Alert |
| Edit Remove | Field Update | Approved |

| Final Rejection Actions  | | |
|---|--------------|---------------------------------------|
| Action | Type | Description |
| Edit | Record Lock | Unlock the record for editing |
| Edit Remove | Field Update | Rejected |
| Edit Remove | Email Alert | Rejection Email Alert |



Task 7: Create A Record-Triggered Flow

Set up a Record-Triggered Flow to automate the submission of Appointment records for approval.

Subtask 1: Configure the Start Element

Initiate a flow that triggers upon the creation of an Appointment record.

1. From **Setup**, enter **Flows** in the Quick Find box, then select **Flows**.
2. Click **New Flow**.
3. Select **Record-Triggered Flow**.

The screenshot shows the 'Select Type' window with the title 'Select Type' at the top. Below it, there's a section titled 'Recommended' containing five flow types:

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

4. Click **Create**. The **Configure Start** window opens.
5. For **Object**, select **Appointment**.

-
-
6. For Trigger the Flow When, select A record is created.



Select Object

Select the object whose records trigger the flow when they're created, updated, or deleted.

* Object

Appointment

Configure Trigger

* Trigger the Flow When:

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

Set Entry Conditions

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

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

Condition Requirements

None

Subtask 2: Add An Action Element

Add an Action element to submit the Appointment record for approval automatically.

1. Add an **Action** element after the **Start** element.
2. Select the **Submit for approval** action and label it as **Approval SubFlow**.
3. Set the **RecordId** to **{!\$Record.Id}**.



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Submit for Approval

* Label
Approval SubFlow

* API Name ⓘ
Approval_SubFlow

Description

Submit for Approval ⓘ submit-submit

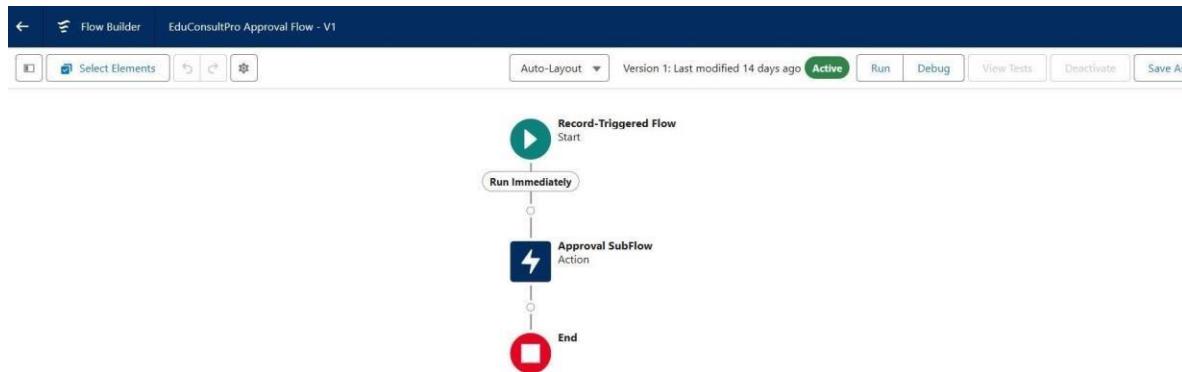
Use values from earlier in the flow to set the inputs for the "Submit for Approval" core action. To use its outputs later in the flow, store them in variables.

Set Input Values for the Selected Action

Aa * Record ID ⓘ
Aa Triggering Appointment_c > Record ID X

Aa Approval Process Name Or ID
Not Included

4. Save the Flow, label it as **EduConsultPro Approval Flow**, and click **Activate**.





Task 8: Create A ScreenFlow For Existing Students To Book An Appointment

Subtask 1: Add Screen Element

Start the flow by gathering student information using a Screen element.

1. From **Setup**, enter **Flow Builder** in Quick Find and select **New Flow → ScreenFlow**.
2. Add a **Screen** element.
3. In the **Screen Properties** pane, for **Label**, enter “**Get Student Info**”.
4. Add two **Text** components from the left-side panel.
 - 1st Text Component Label: **Enter Student Name**
 - 2nd Text Component Label: **Enter Student Email**

Edit Screen

EduConsultantPro Existing Student Flow

Enter Student Name

Enter Student Email

Pause Previous Finish

Components Fields

Search components...

Input (53)

- Action Button (Beta)
- Add Attendees
- Address
- Call Script
- Cancel Appointment
- Checkbox
- Checkbox Group
- Choice Lookup

Get more on the AppExchange

Screen Properties

*Label

*API Name

Description

> Configure Header

> Configure Footer

Cancel Done

1



5. Click **Done**.

Subtask 2: Get Record

1. Add a **GET Record** element after the Screen element, label it as “**Get Rec**”.
2. Configure the GET Record element:
 - **Select Object:** Student
 - **Condition Requirement:** All Conditions are Met (AND)
 - **Field:** Student Name
 - **Operator:** Equals
 - **Value:** {!Enter_Student_Name}
 - **Field:** Email_c
 - **Operator:** Equals
 - **Value:** {!Enter_Student_Email}

Field: Student Name

- **Operator:** Equals
- **Value:** {!Enter_Student_Name}

▪ **Field:** Email_c

- **Operator:** Equals
- **Value:** {!Enter_Student_Email}

Get Records

* Label: Get Rec * API Name: Get_Rec

Description:

Get Records of This Object

* Object: Student

Filter Student Records

Condition Requirements: All Conditions Are Met (AND)

Field: Student_Name__c Operator: Equals Value: Aa Enter_Student_Name X

Field: Email__c Operator: Equals Value: Aa Enter_Student_Email X

+ Add Condition

The screenshot shows a configuration interface for a 'Get Records' action. It includes fields for 'Label' (Get Rec), 'API Name' (Get_Rec), and 'Description'. Below this, there's a section for 'Get Records of This Object' where 'Object' is set to 'Student'. The main focus is 'Filter Student Records', which uses a logical AND operator. Two conditions are defined: one for 'Student_Name__c' with 'Operator' set to 'Equals' and 'Value' as 'Aa Enter_Student_Name'; another for 'Email__c' with 'Operator' set to 'Equals' and 'Value' as 'Aa Enter_Student_Email'. A button '+ Add Condition' is available for adding more filters.



Subtask 3: Add a Decision Element

1. Add a **Decision** element after the GET Record element, label it as “**Appointment or Case**”.
2. Configure the Decision element:
 - **Outcome Label:** Appointment
 - **Resource:** {!How_may_I_Help_you}
 - **Operator:** Equals
 - **Value:** {!Book_an_Appointment}
 - Click on the “+” icon to add paths for other options such as Case, Default.

 Decision X

* Label * API Name i
Appointment or Case Appointment_or_Case

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 | Delete Outcome |
|---|---|---|
| 1 Appointment | *Label Appointment *Outcome API Name <small>i</small> Appointment | Delete |
| 2 Case | | |
| Condition Requirements to Execute Outcome | | |
| Default Outcome | | |
| All Conditions Are Met (AND) ▼ | | |
| Resource Aa How_may_I_Help_you X Operator Equals Value Aa Book_an_Appointment X Delete | | |
| + Add Condition | | |



Subtask 4: Add Screen Element

1. Add a **Screen** element after the Decision element, on the Appointment path, and label it as “**Appointment Booking Screen**”.
2. Click on **Fields**, then **Record Variable Input**, and create a new Resource (**AppointmentRecordRes**) to display all the fields in the Appointment object.
3. Drag the necessary fields onto the screen to collect student information. 4. Click **Done**.

Edit Screen

EduConsultantPro Existing Student Flow

Appointment Date/Time

Date Time

Purpose/Topic

Notes

Screen Properties

*Label:

*API Name:

Description:

> Configure Header

> Configure Footer

Subtask 5: Add GET Record Element

1. Add a **GET Record** element after the Decision element, under the Appointment path, and label it as “**Get Consultant Rec**”.
2. Configure the GET Record element:
 - **Select Object:** Consultant
 - **Condition Requirement:** All Conditions are Met (AND)



- **Field:** Name

- **Operator:** Equals

- **Value:** {!AppointmentRecordRes.Consultant_Name_c}

Get Records X

| | |
|---|-----------------------------|
| * Label | * API Name <small>i</small> |
| Get Consultant Rec | Get_Consultant_Rec |
| Description | |
| <div style="height: 40px; border: 1px solid #ccc;"></div> | |

Get Records of This Object

| |
|------------|
| * Object |
| Consultant |

Filter Consultant Records

Condition Requirements

| |
|---|
| All Conditions Are Met (AND) ▼ |
|---|

Field Operator Value

| | | |
|------|--------|--|
| Name | Equals | Aa AppointmentRecordRes > Ap... X |
|------|--------|--|

+ Add Condition Delete

Subtask 6: Create Appointment Record Using Create Records Element

1. Add a **Create** element after the GET Consultant Rec element
and label it as “**Create Appointment**”.

50



2. Configure the Create element: • **Select Object:**

Appointment • **Field Values:**

- **Appointment_DateTime_c:**
 {!AppointmentRecordRes.Appointment_DateTime_c}
- **Consultant_c:** {!Get_Consultant_Rec.Id}
- **Notes_c:** {!AppointmentRecordRes.Notes_c}
- **PurposeTopic_c:** {!AppointmentRecordRes.PurposeTopic_c}
- **Student_Name_c:** {!Get_Rec.Id}

Create Records

| | |
|---|---|
| * Label | * API Name <small>(i)</small> |
| Create Appointment | Create_Appointment |
| Description | |
| <input type="text"/> | |
| * How to set record field values | |
| Manually | |
| Create a Record of This Object | |
| * Object | |
| Appointment | |
| Set Field Values for the Appointment | |
| Field | Value |
| Appointment_DateTime__c | AppointmentRecordRes > Appointment Date/... <input type="button" value="X"/> <input type="button" value="Delete"/> |
| Field | Value |
| Consultant__c | Aa Consultant from Get_Consultant_Rec > Record ... <input type="button" value="X"/> <input type="button" value="Delete"/> |
| Field | Value |
| Notes__c | Aa AppointmentRecordRes > Notes <input type="button" value="X"/> <input type="button" value="Delete"/> |



Subtask 7: Add Screen Element

1. Add a **Screen** element after the Create Appointment element, and label it as “**Confirmation Screen**”.
2. From the left side panel, search for the **Display Text** component and drag it to the main panel, label it as “**Appointment_Confirmation**”.
3. Paste the following text in the Resource picker box: Consultant Name :
{!Get_Constant_Rec.Name},
Date & Time : {!AppointmentRecordRes.Appointment_DateTime_c}, Notes
: {!AppointmentRecordRes.Notes_c} 4.

Click Done.

Edit Screen

EduConsultantPro Existing Student Flow

Consultant Name : {!Get_Constant_Rec.Name},
Date & Time : {!AppointmentRecordRes.Appointment_DateTime_c},
Notes : {!AppointmentRecordRes.Notes_c} 4.

Components Fields

Search components...

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

Get more on the AppExchange

Screen Properties

* Label Confirmation Screen

* API Name Confirmation_Screen

Description

> Configure Header

> Configure Footer

Cancel Done



Edit Screen

EduConsultantPro Existing Student Flow

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

Display text

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

Cancel Done

Components Fields

Search components...

Input (53)

- Action Button (Beta)
- Add Attendees
- Address
- Call Script
- Cancel Appointment
- Checkbox
- Checkbox Group
- Choice Lookup

Get more on the AppExchange

Subtask 8: Add a Subflow Element

1. Add a **Subflow** element after the Decision element, on the Case path, and search and select “Create a Case”, label it as “Create Student Case”.
2. Configure the Subflow element as needed.



Create a Case

X

* Label

Create Student Case

* API Name 

Create_Student_Case

Description

Referenced Flow



Create a Case

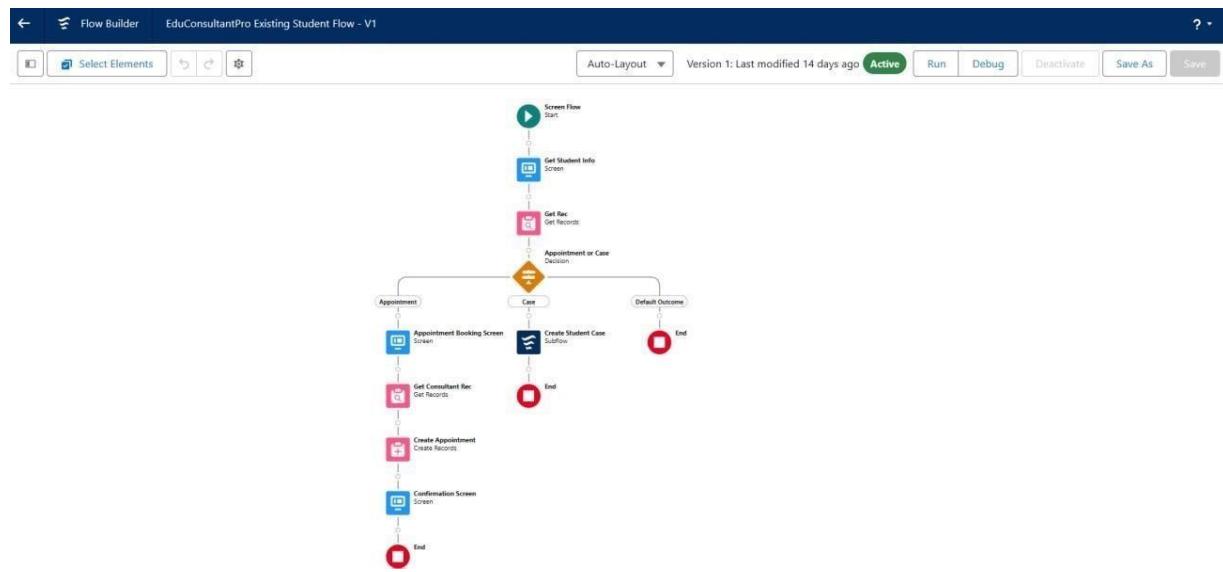
setup_service_experience__Create_Case



1



3. Save the flow, label it as “**EduConsultantPro Existing Student Flow**”, and activate it.



Task 9: Create A ScreenFlow to Combine All The Flows At One Place

This task involves creating a central ScreenFlow that integrates various existing flows, allowing users to choose and access different functionalities from a single interface.

Subtask 1: Add Welcome Screen Element

1. From Setup, enter **Flow Builder** in the Quick Find box, select **New Flow → Screen Flow**.
2. Add a **Screen** element and label it as “**Welcome Screen**”.

1



3. From the left side panel, drag the **Display Text** component to the main panel.
4. Label the Display Text component as "**SuccessMessage**".
5. Paste the following text into the Resource picker box:

“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!”

6. Click Done.



Edit Screen

Components

Fields

Search components...

Input (53) ▼

- Action Button (Beta)
- Add Attendees
- Address
- Call Script
- Cancel Appointment
- Checkbox
- Checkbox Group
- Choice Lookup

[Get more on the AppExchange](#)

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.

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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!

Screen Properties

*Label

*API Name

Description

> Configure Header

> Configure Footer

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

Subtask 2: Add Existing or New Student Confirmation Screen

1. Add a **Screen** element after the Welcome Screen element and label it as “**Existing or New Student Confirmation Screen**”.
2. Add a **Radio Button** component from the left side panel.
 - **Label:** Are you an Existing Student?
 - **Choice 1:** “Yes”
 - **Choice 2:** “No”
3. Click **Done**.



Salesforce PARTNER



Salesforce PARTNER

Edit Screen

Components Fields

Search components...

Are you a Existing Student

Yes
 No

Previous

Screen Properties

*Label: Existing or New Student Confirmation Screen

*API Name: Existing_or_New_Student_Confirmation_Screen

Description:

> Configure Header
> Configure Footer

Edit Screen

Components Fields

Search components...

Are you a Existing Student

Yes
 No

Previous

← Radio Buttons

Let Users Select Multiple Options

Yes
 No

Component Type: Radio Buttons

*Choice:

*Choice:

+ Add Choice

Default Value:



Subtask 3: Add Decision Element

1. Add a **Decision** element after the Existing or New Student Confirmation Screen element and label it as “**Decision 1**”.
2. Create an outcome:
 - **Label:** If Existing Student
 - **Resource:** {!Are_you_a_Existing_Student}
 - **Operator:** Equals
 - **Value:** {!Yes}
3. Click the “+” icon to add more outcomes for “No” and other cases as required.

The screenshot shows the configuration of a 'Decision' element. At the top, there are fields for 'Label' (Decision 1) and 'API Name' (Decision_1). Below this is a 'Description' field. The main section is titled 'Outcomes' with the sub-instruction: '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.' It includes an 'OUTCOME ORDER' section with a plus sign to add more outcomes. An 'OUTCOME DETAILS' section shows an outcome for 'If Existing Student' with a label 'If Existing Student', an outcome API name 'If_Existing_Student', and a condition requirement 'All Conditions Are Met (AND)'. Below this is a table for defining conditions, showing a row with Resource '{!A ... > Are_you_a_Existing_Student}', Operator 'Equals', and Value '{!A Yes}'. A 'Delete Outcome' button is also visible.

OUTCOME ORDER +/-

| | | | | | | | | | | |
|--|---|--------------------------------------|----------|-------|---|-------------------------------------|--------------------------------------|--|--|--|
| If Existing Student | OUTCOME DETAILS | | | | | | | | | |
| If not a existing user | *Label <input type="text" value="If not a existing user"/> *Outcome API Name <input type="text" value="if_Not_a_Existing_Student"/> | | | | | | | | | |
| Condition Requirements to Execute Outcome | | | | | | | | | | |
| All Conditions Are Met (AND) | | | | | | | | | | |
| <table style="width: 100%; border-collapse: collapse;"><tr><td style="width: 15%;">Resource</td><td style="width: 15%;">Operator</td><td style="width: 15%;">Value</td></tr><tr><td><input type="text" value="Aa ... > Are_you_a_Existing_Student X"/></td><td><input type="text" value="Equals"/></td><td><input type="text" value="Aa No X"/></td></tr><tr><td colspan="3" style="text-align: right; padding-right: 10px;">+ Add Condition</td></tr></table> | | Resource | Operator | Value | <input type="text" value="Aa ... > Are_you_a_Existing_Student X"/> | <input type="text" value="Equals"/> | <input type="text" value="Aa No X"/> | + Add Condition | | |
| Resource | Operator | Value | | | | | | | | |
| <input type="text" value="Aa ... > Are_you_a_Existing_Student X"/> | <input type="text" value="Equals"/> | <input type="text" value="Aa No X"/> | | | | | | | | |
| + Add Condition | | | | | | | | | | |

Default Outcome

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Subtask 4: Add Subflow for Existing Students

1. Add a **Subflow** element after the **Decision 1** element on the **If Existing Student** path.
2. Search for and select “**EduConsultantPro Existing Student Flow**”.
3. Label it as “**Existing Student Flow**”.
4. Click **Done**.

EduConsultantPro Existing Student Flow ×

* Label

* API Name (i)

Description

Referenced Flow
 EduConsultantPro Existing Student Flow
EduConsultantPro_Existing_Student_Flow ▼

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.



Subtask 5: Add Subflow for New Students

1. Add a **Subflow** element after the **Decision 1** element on the **If Not an Existing Student** path.
2. Search for and select “**EduConsultantPro Student Flow**”.
3. Label it as “**New Student Flow**”.
4. Click **Done**.



EduConsultPro Student Flow



* Label

New Student Flow

* API Name 

New_Student_Flow

Description

Referenced Flow



EduConsultPro Student Flow

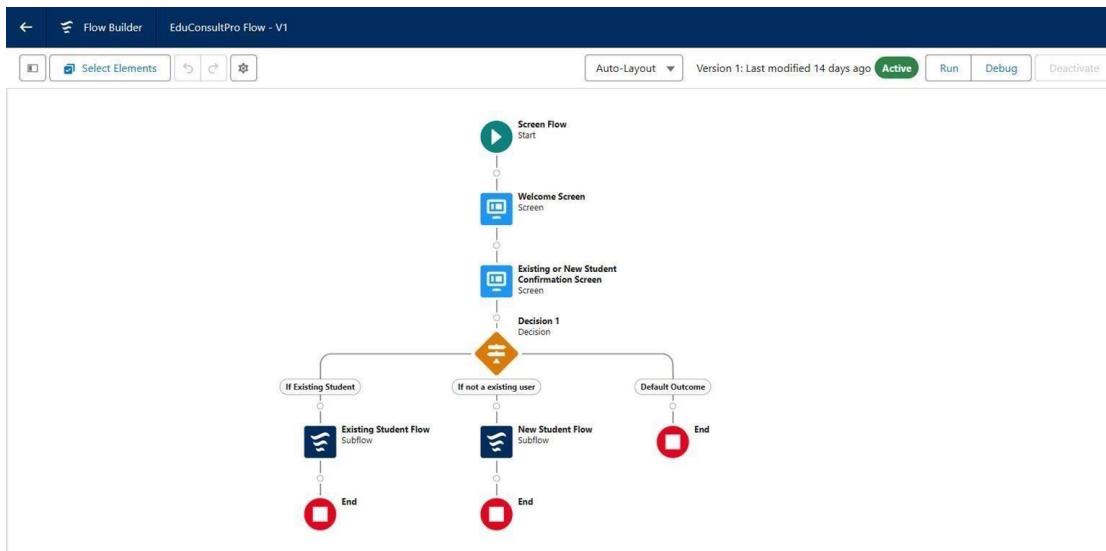
EduConsultPro_Student_Flow



Use values from the parent flow to set the inputs for the "EduConsultPro 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 "EduConsultPro Student Flow" flow.



Save the flow, label it as “**EduConsultantPro Flow**”, and activate it.



Task 10: Create A Lightning App Page

This task involves creating a Lightning App Page and making it available in the application. The new page will feature the "EduConsultantPro Flow" component.

Subtask 1: Create A Lightning App Page

1. Access Lightning App Builder:

- From Setup, enter **App Builder** in the Quick Find box.

- Click Lightning App Builder.



The screenshot shows the Salesforce Setup interface. The left sidebar has sections like Feature Settings (Service, Field Service, Field Service Mobile), User Interface (Lightning App Builder), and a search bar. The main area is titled "Lightning App Builder" and shows a table of "Lightning Pages". A red box highlights the "New" button in the top right of the table header. The table includes columns for Action, Label, Name, Namespace Prefix, Description, Type, Created By, and Last Modified By. One row is visible: "Edit | Clone | Del" for "EduConsultPro_Home_Page", "EduConsultPro_Home_Page" as the name, and "Home Page" as the type.

| Action | Label | Name | Namespace Prefix | Description | Type | Created By | Last Modified By |
|--------------------|-------------------------|-------------------------|------------------|-------------|-----------|----------------------------|----------------------------|
| Edit Clone Del | EduConsultPro_Home_Page | EduConsultPro_Home_Page | | | Home Page | DSing. 08/08/2024, 4:16 pm | DSing. 22/08/2024, 9:53 pm |

2. Create a New Home Page: • Click New.

- Select Home Page and click Next.

Create a new Lightning page

App Page

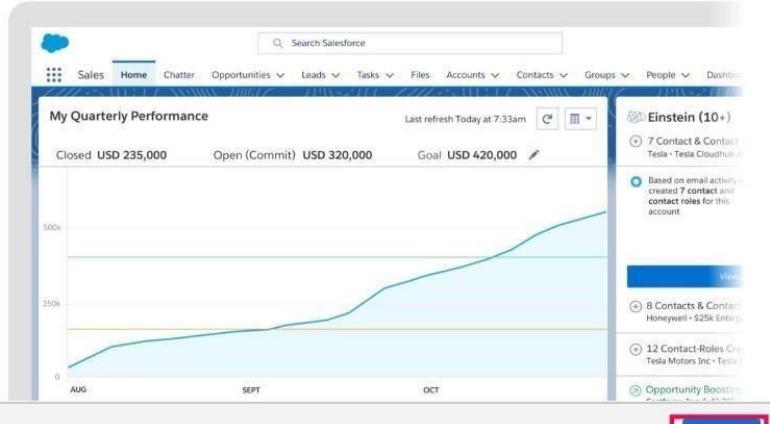
Home Page

Record Page

Embedded Service Page

Voice Extension

Customize the Lightning Experience Home page.



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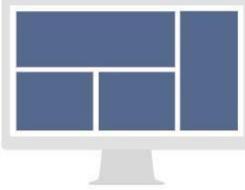
Configure the Home Page:

- **Name the Page:** Enter “**EduConsultPro Home Page**”.
- **Select a Template:** Choose the **Standard Home Page** template. ▪ Click **Done**.

Create a new Lightning page

CHOOSE PAGE TEMPLATE CLONE SALESFORCE DEFAULT PAGE

| | |
|--|-------------------------------------|
| STANDARD (7) | |
| Header and Three Regions | <input type="checkbox"/> |
| Home Template One Region | <input type="checkbox"/> |
| Home Template One Region | <input type="checkbox"/> |
| Home Template One Region | <input type="checkbox"/> |
| Home page header two columns left side bar | <input type="checkbox"/> |
| Standard Home Page | <input checked="" type="checkbox"/> |
| CUSTOM (0) | <input type="checkbox"/> |



Lightning Experience Home page template with a header above two equal-width regions, and a full-height sidebar.

Supported form factors: desktop.

Back **Done**

3. Add the Flow Component:

- Drag the **Flow** component to the **top-right** region of the page layout.
- In the component properties pane, search for and select “**EduConsultantPro Flow**”.



The screenshot shows the Lightning App Builder interface. At the top, there's a navigation bar with 'Lightning App Builder', 'Pages', and 'EduConsultPro Home Page'. Below the navigation is a toolbar with icons for back, forward, search, and other functions. The main area is divided into two sections: 'Components' on the left and the 'Page > Flow' configuration on the right.

Components:

- A search bar with 'flow' typed in.
- A dropdown menu showing 'Standard (3)' expanded, with 'Flow' selected and highlighted by a red box.
- Other options under Standard: 'Flow App Home cards' and 'Paused Flow Interviews'.
- 'Custom (0)' and 'Custom - Managed (0)' sections are collapsed.

Page > Flow:

- A placeholder message: 'This is a placeholder. Flows don't run in the canvas so that they don't accidentally do something in your org, like create or delete records.'
- A 'Flow Component' section containing 'EduConsultPro Flow'.
- An 'Add Component(s) Here' button.
- A second 'Add Component(s) Here' button below it.
- On the right side of the flow component, there's a search bar with 'EduConsultPro Flow' typed in.
- Configuration sections include 'Edit Flow in Flow Builder' (with a link), 'Layout' set to 'One Column', 'Set Component Visibility' (collapsed), and 'Filters' (with a '+ Add Filter' button).

4. Save and Activate the Page: • Click Save.

- Click **Activate**.

5. Assign the Page to Apps and Profiles: • Click App and Profile.

- Click **Assign to Apps and Profiles**.
- **Select the Sales App:** Choose **Sales** and click **Next**.
- **Assign to Profiles:** Scroll down and select **System Administrator** profile. Click **Next**.
- **Review and Save:** Review the assignment details and click **Save**.



Select Apps

First, select the Lightning apps to display "EduConsultPro Home Page" as the home page. You'll select the related profiles next.

| Lightning Apps (12) | | 1 Selected |
|---|---|------------|
| App Name | Description | |
| <input checked="" type="checkbox"/> Sales | Manage your sales process with accounts, leads, opportunities, and m... | |
| <input type="checkbox"/> Sales Console | (Lightning Experience) Lets sales reps work with multiple records on o... | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |

Select Profiles

Select the profiles to display "EduConsultPro Home Page" as the home page.

| Profiles (41) | | 1 Selected |
|--|-------------|------------|
| Profile | Description | |
| <input type="checkbox"/> Silver Partner User | | |
| <input type="checkbox"/> Solution Manager | | |
| <input type="checkbox"/> Standard Platform User | | |
| <input type="checkbox"/> Standard User | | |
| <input checked="" type="checkbox"/> System Administrator | | |



Activation: EduConsultPro Home Page

The org default home page is displayed unless more specific assignments are made.

The app default home page is displayed for specified apps, and overrides the org default.

Any app and profile assignments are displayed for specified app and profile combinations, and they override all other assignments.

[Learn more about forecast page assignment in Salesforce Help.](#)

Org Default App Default App and Profile

Set the home page for different user profiles when they're using certain apps. These assignments are the most specific, and override all other home page assignments.

Assignments (1)

Add Assignments Remove Assignments

App

Profile

Sales

System Administrator

[Close](#)

