

# **A CRM Application to Manage the Services offered by an Institution**

## **Team Members**

- Advait. A (Team Leader)
- Sakthivel. P
- Gokul. S
- Harish. R

**NM Team ID:** C29CFE8D174D71A9DAB431B5834CD3F2

**College Name:** Suguna College of Engineering

## **Project Overview**

This project is focused on creating a comprehensive CRM application for managing the services offered by an educational institution. The primary challenge addressed is the efficient tracking and management of services, appointments, and consultant interactions. The goal is to deliver a robust solution by leveraging Salesforce's powerful platform. Through this project, we aim to enhance operational efficiency, user experience, and data accuracy, supporting the long-term goals of the institution.

## **Objectives**

### **Business Goals:**

- Improve service management efficiency.
- Enhance communication between consultants and students.
- Streamline appointment scheduling and tracking.

### **Specific Outcomes:**

- A centralized system for managing services.
- Automated appointment scheduling and reminders.
- Real-time tracking and reporting of service interactions.

## Salesforce Key Features and Concepts Utilized

- **Objects and Fields:** Custom objects for "Consultant" and "Appointment" with relevant fields.
- **Picklist Fields:** Dynamic picklist for selecting consultants based on the "First Name" field.
- **Workflows and Approvals:** Automated workflows for appointment approvals and reminders.
- **Reports and Dashboards:** Real-time reporting to track service utilization and consultant performance.


## Detailed Steps to Solution Design

### Create Objects from Spreadsheet:

#### Create Course object:

- Go to your object manager and click on create object from spreadsheet
- Click on the link to get the spreadsheet, Course.
- After downloading, upload the file, map the fields and upload to create an object.

## Nice Work!



Now you can add your object to a Lightning app. You might need to refresh the object list to see it.

### Import Overview


|                          |                     |
|--------------------------|---------------------|
| Object Created<br>Course |                     |
| Fields Detected<br>5     | Fields Created<br>5 |
| Rows Detected<br>5       | Rows Imported<br>5  |

[Import Another Object](#)

#### Create Remaining objects:

- Follow the steps which we have followed for course object creation.
- Use the following sheets for remaining objects.
  - A. Consultant
  - B. Appointment
  - C. Student

## Nice Work!




Now you can add your object to a Lightning app. You might need to refresh the object list to see it.

### Import Overview

|                                     |                            |
|-------------------------------------|----------------------------|
| <b>Object Created</b><br>Consultant |                            |
| <b>Fields Detected</b><br>6         | <b>Fields Created</b><br>6 |
| <b>Rows Detected</b><br>3           | <b>Rows Imported</b><br>3  |

[Import Another Object](#)

## Nice Work!



Now you can add your object to a Lightning app. You might need to refresh the object list to see it.

### Import Overview

|                                      |                            |
|--------------------------------------|----------------------------|
| <b>Object Created</b><br>Appointment |                            |
| <b>Fields Detected</b><br>5          | <b>Fields Created</b><br>5 |
| <b>Rows Detected</b><br>0            | <b>Rows Imported</b><br>0  |

[Import Another Object](#)

# Nice Work!



Now you can add your object to a Lightning app. You might need to refresh the object list to see it.

## Import Overview

Object Created  
Student

Fields Detected  
12

Rows Detected  
2

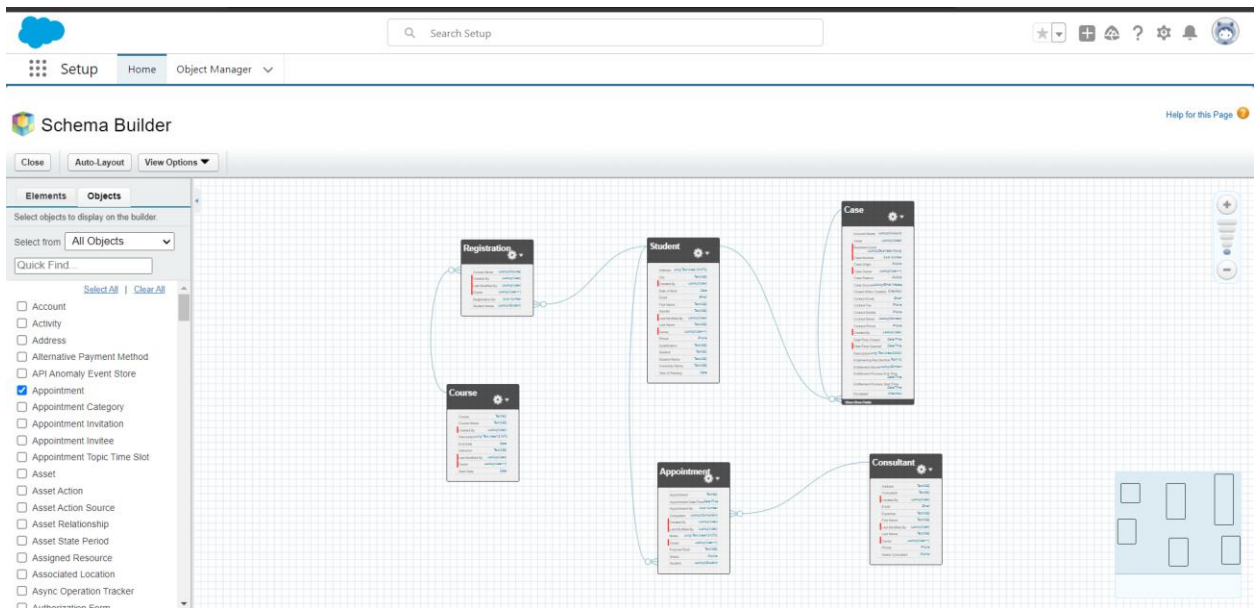
Fields Created  
12

Rows Imported  
2

[Import Another Object](#)

## Create Relationship among the objects:

- Create lookup between appointment and student, appointment and consultant.
- Create an object to store the information student and course details with the name Registration.
- Also create a lookup between student and case to store the student queries for immigration or visa application.
- The data model should be similar to the below Data Model with fields & relationships:
- Create tabs for the respective object.



## Configure the Case Object:

- Go to object manager, edit case object.
- Select the “Type” field and add the values in it.
  1. Immigration
  2. Visa Application
- Now Select the “Status” field and add the values in it.
  1. Open
  2. In-progress

Case Field Type

Back to Case Fields

EditSet Field-Level SecurityView Field Accessibility

Field Information

| Field Label               | Type     | Field Name | Type |
|---------------------------|----------|------------|------|
| Data Type                 | Picklist |            |      |
| Help Text                 |          |            |      |
| Description               |          |            |      |
| Data Owner                |          |            |      |
| Field Usage               |          |            |      |
| Data Sensitivity Level    |          |            |      |
| Compliance Categorization |          |            |      |

Picklist Values Used

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

Field Dependencies

New

No dependencies defined.

Validation Rules

New

No validation rules defined.

Case Type Picklist Values

NewReorderReplacePrintable ViewChart Colors

| Action  | Values           | API Name         | Default                  | Chart Colors         | Modified By                                 |
|---|------------------|------------------|--------------------------|----------------------|---|
| <a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a> | Mechanical       | Mechanical       | <input type="checkbox"/> | Assigned dynamically | <a href="#">Advait</a> 21/08/2024, 11:45 am |
| <a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a> | Electrical       | Electrical       | <input type="checkbox"/> | Assigned dynamically | <a href="#">Advait</a> 21/08/2024, 11:45 am |
| <a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a> | Electronic       | Electronic       | <input type="checkbox"/> | Assigned dynamically | <a href="#">Advait</a> 21/08/2024, 11:45 am |
| <a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a> | Structural       | Structural       | <input type="checkbox"/> | Assigned dynamically | <a href="#">Advait</a> 21/08/2024, 11:45 am |
| <a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a> | Other            | Other            | <input type="checkbox"/> | Assigned dynamically | <a href="#">Advait</a> 21/08/2024, 11:45 am |
| <a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a> | Immigration      | Immigration      | <input type="checkbox"/> | Assigned dynamically | <a href="#">Advait</a> 12/10/2024, 5:57 pm  |
| <a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a> | Visa Application | Visa Application | <input type="checkbox"/> | Assigned dynamically | <a href="#">Advait</a> 12/10/2024, 5:57 pm  |

## Create a Lightning App:

- Go to Setup, search for the App Manager in quick find
- Click on New Lightning App
- Give app name as “EduConsultPro”, click Next, Next, Next
- Add Home, Students, Courses, Consultants, Appointments, Registrations, and Cases from the Available Items to Selected Items.
- Add “System Administrator” profile from Available Profiles to Selected Profiles, click Save & Finish.

| <div> <div> <div>SETUP</div> <div>Lightning Experience App Manager</div> </div> <div> <div>New Lightning App</div> <div>New Connected App</div> </div> </div> |                       |                          |   |                      |           |         |
|---|-----------------------|--------------------------|---|----------------------|-----------|---------|
| <div> <div>24 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type, App Type</div> <div> <div>⚙</div> </div> </div>                        |                       |                          |   |                      |           |         |
|   | App Name ↑            | Developer Name           | Description   | Last Modified Date   | App ...   | Visi... |
| 1   | All Tabs              | AllTabSet                |   | 21/08/2024, 11:45 am | Classic   |         |
| 2   | Analytics Studio      | Insights                 | Build CRM Analytics dashboards and apps   | 21/08/2024, 11:45 am | Classic   | ✓       |
| 3   | App Launcher          | AppLauncher              | App Launcher tabs   | 21/08/2024, 11:45 am | Classic   | ✓       |
| 4   | Automation            | FlowsApp                 | Automate business processes and repetitive tasks.                                 | 21/08/2024, 11:49 am | Lightning | ✓       |
| 5   | Bolt Solutions        | LightningBolt            | Discover and manage business solutions designed for your industry.                | 21/08/2024, 11:48 am | Lightning | ✓       |
| 6   | Business Rules Engine | ExpressionSetConsole     | Create and maintain business rules that perform complex lookups and calculations. | 13/10/2024, 11:19 am | Lightning | ✓       |
| 7   | Community             | Community                | Salesforce CRM Communities  | 21/08/2024, 11:45 am | Classic   | ✓       |
| 8   | Content               | Content                  | Salesforce CRM Content  | 21/08/2024, 11:45 am | Classic   | ✓       |
| 9   | Data Manager          | DataManager              | Use Data Manager to view limits, monitor usage, and manage recipes.               | 21/08/2024, 11:45 am | Lightning | ✓       |
| 10  | Digital Experiences   | SalesforceCMS            | Manage content and media for all of your sites.                                   | 21/08/2024, 11:45 am | Lightning | ✓       |
| 11  | EduConsultPro         | EduConsultPro            |   | 12/10/2024, 6:41 pm  | Lightning | ✓       |
| 12  | Lightning Usage App   | LightningInstrumentation | View Adoption and Usage Metrics for Lightning Experience                          | 21/08/2024, 11:45 am | Lightning | ✓       |
| 13  | Marketing CRM Classic | Marketing                | Track sales and marketing efforts with CRM objects.                               | 21/08/2024, 11:45 am | Classic   | ✓       |
| 14  | Platform              | Platform                 | The fundamental Lightning Platform  | 21/08/2024, 11:45 am | Classic   |         |

## Create a ScreenFlow for Student Admission Application process:

### Add Screen Element:

- From Setup, enter Flow Builder in quick find, select new flow --> ScreenFlow.
- Add a Screen element.
- In the Screen Properties pane, for Label, enter “Student Info”.
- Click on Fields, click on the record variable input and create a new Resource(StudentRecordRes) to display all the fields which are in the student object. Drag all the fields which are needed to add on the screen inorder to collect the student information.

### Create Student Record using Create Element:

- Add a Create element after Student Info Screen Element, Label it as “Create Student Record.”
- Select “one” under How many records to Create, and select “use all values from a record” under How to Set the record fields.
- Select the record variable resource(StudentRecordRes) which we have created in the Student Info screen element, under Create a record from these values.

### Add Screen Element:

- Add a Screen Element after Create Student Record Element and label it as Course Screen.

- Add a picklist component from the left side panel label it as “Select Course”, under choices type “IELTS” and enter. This creates a variable with the name IELTS.
- Repeat the same for GRE, GMAT, Duolingo, TOEFL.

#### **Add Decision Element:**

- Add a Decision Element after Select Course Screen Element, label it as Selecting Course.
- Under outcome label it as “Selected IELTS” and write the condition such as below:  
Resource : Select\_Course (Screen Component from Select Course Screen Element)  
Operator : Equals  
Value : IELTS (Choice Variable from Select Course Screen Element)
- Click on the “+” icon and Repeat the above step for other options mentioned as below:
  - A. GRE
  - B. GMAT
  - C. DuoLingo
  - D. TOEFL
- Click Done.

#### **Add GET Record Element:**

- Add a GET Record Element after Decision Element, under the IELTS path and label it as “Get IELTS Rec”.
- Select Object : Course  
Condition Requirement : All Conditions are Met(AND)  
Field : Course Name  
Operator : Equals  
Value : {!Select\_Course}
- Repeat the above steps for the GRE, GMAT, TOEFL, DuoLingo paths

#### **Create Registration Record using Create Records Element:**

- Add a Create element after the Get IELTS Rec element and label it as “Create IELTS Registration Rec”.
- Select “one” under How many records to Create, and select “Use separate resources, and literal values” under How to Set the record fields.

- Select Object : Registration
  - A. Field : Course\_Name\_\_c
  - B. Value : {!Get\_IELTS\_Rec.Id}
  - C. Field : Student\_Name\_\_c
  - D. Value : {!StudentRecordRes.Id}
- Repeat the steps above steps for the GRE, GMAT, TOEFL, DuoLingo paths.

### **Create Email Text Template Variables for email body and subject:**

- Click on the toggle toolbox on the left corner, click “New Resource”, then select “Text Template” as Resource Type.
- Give the API name as “StuRegistrationEmailTextTempBody”, select “view as plain text” and paste the below text in body.

“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.”

- Click Done.

#### **Add an Action Element:**

- Add an Action Element after all the Decision paths, label it as “Send Email to Student”.
- Under “Set input values for selected action”, include body, Recipient Address List and Subject.
- For input Body : `{!StuRegistrationEmailTextTempBody}`,  
Recipient Address List : `{!StudentRecordRes.Email__c}`,  
Subject : `{!StuRegistrationEmailTextTempSub}`.

#### **Add Screen Element:**

- Add a Screen Element after the Send Email to Student Action Element, label it as Success Screen.
- From the left side panel search for the Display text component and drag it to the main panel, label it as “SuccessMessage”.
- Paste the below in the Resource picker box.

“Dear `{!StudentRecordRes.Name}`,

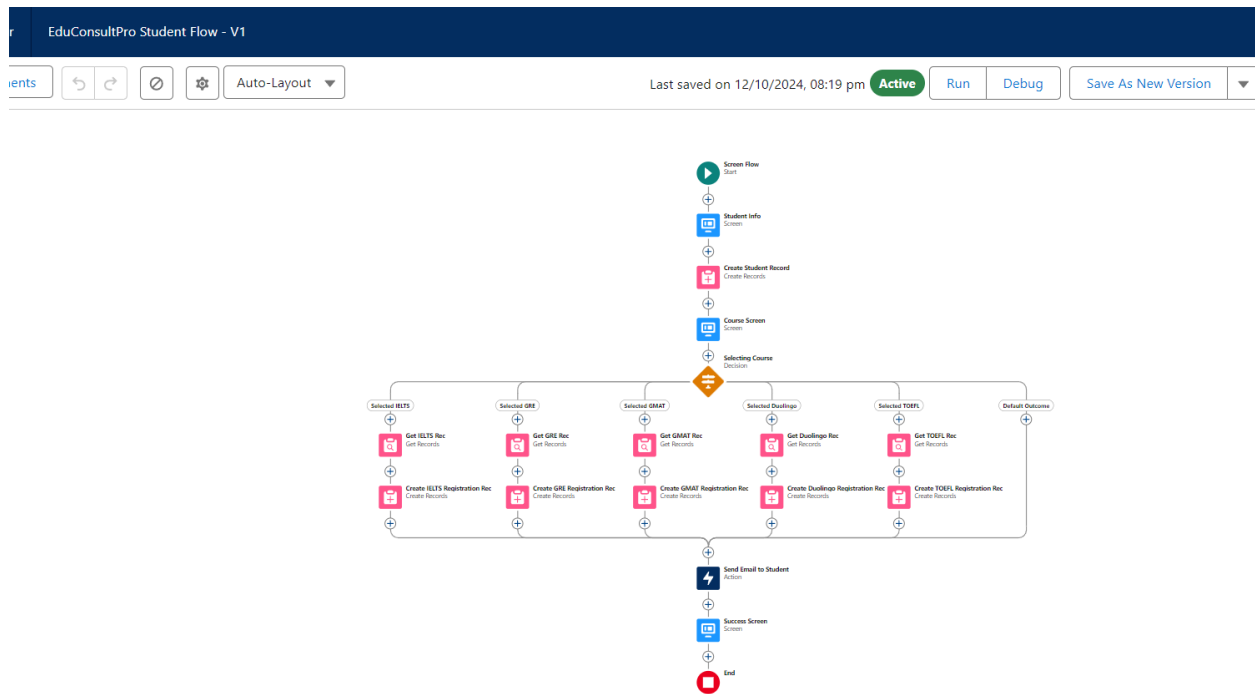
Congratulations and welcome to EduConsultantPro!

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.”

- Click Done.
- Save the flow and name it as “EduConsultPro Student Flow”. Your flow will look as shown below:




## Create Users:

### User:

- Go to Setup --> Administration --> Users --> New User
- LastName : Consultant
- License : Salesforce Platform
- Profile : Standard Platform User
- Fill all the mandatory fields & Save.

### Configure the User Settings:

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



SETUP

Users

[Permission Set Assignments \(1\)](#) | 
 [Permission Set Assignments: Activation Required \(0\)](#) | 
 [Permission Set Group Assignments \(0\)](#) | 
 [Permission Set License Assignments \(0\)](#) | 
 [Personal Groups \(0\)](#) | 
 [Public Group Membership \(0\)](#) | 
 [Team \(1\)](#) | 
 [Managers in the Role Hierarchy \(0\)](#) | 
 [OAuth Apps \(7\)](#) | 
 [Third-Party Account Links \(0\)](#) | 
 [Installed Mobile Apps \(0\)](#) | 
 [Authentication Settings for External Systems \(0\)](#) | 
 [Login History \(10+\)](#) | 
 [User Provisioning](#)

User Detail

Edit

Sharing

Change Password

View Summary

|   |  |                                      |                                       |
|---|--|--------------------------------------|---------------------------------------|
| Name  | Advait A                                       | Role                                 |                                       |
| Alias   | AA   | User License                         | Salesforce                            |
| Email   | advaitanil07@gmail.com [Verified]              | Profile                              | System Administrator                  |
| Username  | advaitanil07@gmail.com                         | Active                               | <input checked="" type="checkbox"/>   |
| Nickname  | User17242209504381006867 ⓘ                     | Marketing User                       | <input checked="" type="checkbox"/>   |
| Title   |  | Offline User                         | <input checked="" type="checkbox"/>   |
| Company   | Suguna college of engineering                  | Knowledge User                       | <input type="checkbox"/>              |
| Department  |  | Flow User                            | <input type="checkbox"/>              |
| Division  |  | Service Cloud User                   | <input checked="" type="checkbox"/>   |
| Address   | IN   | Site.com Contributor User            | <input type="checkbox"/>              |
| Time Zone   | (GMT+05:30) India Standard Time (Asia/Kolkata) | Site.com Publisher User              | <input type="checkbox"/>              |
| Locale  | English (India)                                | WDC User                             | <input type="checkbox"/>              |
| Language  | English  | Mobile Push Registrations            | <a href="#">View</a>                  |
| Delegated Approver                                |  | Data.com User Type                   | ⓘ                                     |
| Manager   | Consultant                                     | Accessibility Mode (Classic Only)    | <input type="checkbox"/> ⓘ            |
| Receive Approval Request Emails                   | Only if I am an approver                       | Debug Mode                           | <input type="checkbox"/> ⓘ            |
| Federation ID                                     |  | High-Contrast Palette on Charts      | <input type="checkbox"/> ⓘ            |
| App Registration: One-Time Password Authenticator | <a href="#">[Connect]</a> ⓘ                    | Load Lightning Pages While Scrolling | <input checked="" type="checkbox"/> ⓘ |
| App Registration: Salesforce Authenticator        | <a href="#">[Connect]</a> ⓘ                    | Send Apex Warning Emails             | <input type="checkbox"/>              |

## Create an Approval Process for Property Object:

### Create an Email Template:

- From Setup, enter Templates in the Quick Find box, and then select Lightning Email Templates, toggle on
- go to app launcher, search for “Email Templates”, Create a new folder with the desired name.
- Then create a new email template, select the folder which we have created in the previous steps, enter the below text in the HTML Value and Save it as "Submission Template".

"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.

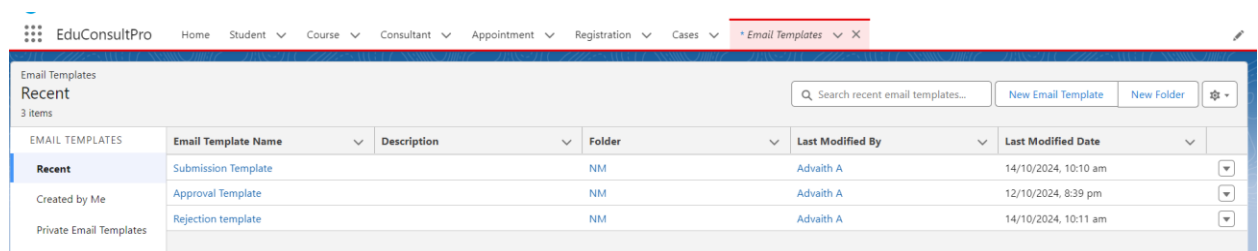
Once again, thank you for choosing to work with me on this matter. I am confident that our collaboration will lead to positive outcomes and progress toward your goals.

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"

- Create two more Email templates for Approval and Rejection of Request similar to the previous one.



The screenshot shows the 'Email Templates' section of the EduConsultPro application. It features a table with columns for 'Email Template Name', 'Description', 'Folder', 'Last Modified By', and 'Last Modified Date'. The table lists three templates: 'Submission Template', 'Approval Template', and 'Rejection template', all created by 'Advait A' on 14/10/2024. The interface includes a search bar, 'New Email Template' and 'New Folder' buttons, and a sidebar with navigation options like 'Home', 'Student', 'Course', 'Consultant', 'Appointment', 'Registration', 'Cases', and 'Email Templates'.


| EMAIL TEMPLATES         | Email Template Name | Description | Folder | Last Modified By | Last Modified Date   |
|-------------------------|---------------------|-------------|--------|------------------|----------------------|
| Recent                  | Submission Template |             | NM     | Advait A         | 14/10/2024, 10:10 am |
| Created by Me           | Approval Template   |             | NM     | Advait A         | 12/10/2024, 8:39 pm  |
| Private Email Templates | Rejection template  |             | NM     | Advait A         | 14/10/2024, 10:11 am |

**Create an Approval Process:**

- From Setup, enter Approval in the Quick Find box, and then select Approval Processes.
- In Manage Approval Processes For, select Appointment.
- Click Create New Approval Process --> Use Jump Start Wizard.
- Configure the approval process.
- Process Name - Appointment Approval, Under Select Approver, Select Manager for the option : “Automatically assign an approver using a standard or custom hierarchy field.”
- Click next and “Next Automated Approver Determined By” --> Select Manager.
- From Record Editability Properties --> Click on Administrators OR the currently assigned approver can edit records during the approval process.
- Save the approval process.
- Click View Approval Process Detail Page.
- Under Initial Submission Actions, click Add New --> Field Update, and configure it with these values

| Field            | Value               |
|------------------|---------------------|
| Name             | Submitted           |
| Field to Update  | Appointment: Status |
| A Specific value | Pending             |

- click Add New --> Email Alert, and configure it with these values.  
Description : Submission Email Alert  
Unique Name : Auto Populates  
Email Template : Submission Template  
Recipient Type : Select your Name
- Repeat the Last Two Steps for Final Approval and Final Rejection actions


**Approval Processes**

---

Process Name

Appointment Approval

Active ☐

Unique Name

Appointment\_Approval

Next Automated Approver Determined By

Manager of Record Submit

Description

Entry Criteria

Administrator OR Current Approver

Allow Submitters to Recall Approval Requests ☐

Record Editability

Approval Assignment Email Template

Initial Submitters

Appointment Owner

Created By

Advait A. 12/10/2024, 9:42 pm

Modified By

Advait A. 14/10/2024, 10:1

---

Initial Submission Actions

Add Existing Add New

| Action  | Type         | Description                            |
|---|--------------|--|
|   | Record Lock  | Lock the record from being edited      |
| <a href="#">Edit</a>   <a href="#">Remove</a> | Field Update | <a href="#">Submitted</a>              |
| <a href="#">Edit</a>   <a href="#">Remove</a> | Email Alert  | <a href="#">Submission Email Alert</a> |

---

Approval Steps

New Approval Step

| Action  | Step Number | Name   | Description | Criteria | Assigned Approver       |
|---|-------------|--------|-------------|----------|-------------------------|
| <a href="#">Show Actions</a>   <a href="#">Edit</a>   <a href="#">Del</a> | 1           | Step 1 |             |          | <a href="#">Manager</a> |

---

Final Approval Actions

Add Existing Add New

| Action  | Type         | Description                          |
|---|--------------|--------------------------------------|
| <a href="#">Edit</a>                          | Record Lock  | Lock the record from being edited    |
| <a href="#">Edit</a>   <a href="#">Remove</a> | Email Alert  | <a href="#">Approval Email Alert</a> |
| <a href="#">Edit</a>   <a href="#">Remove</a> | Field Update | <a href="#">Approved</a>             |

---

Final Rejection Actions

Add Existing Add New

| Action  | Type         | Description                           |
|---|--------------|---------------------------------------|
| <a href="#">Edit</a>                          | Record Lock  | Unlock the record for editing         |
| <a href="#">Edit</a>   <a href="#">Remove</a> | Email Alert  | <a href="#">Rejection Email Alert</a> |
| <a href="#">Edit</a>   <a href="#">Remove</a> | Field Update | <a href="#">Rejected</a>              |

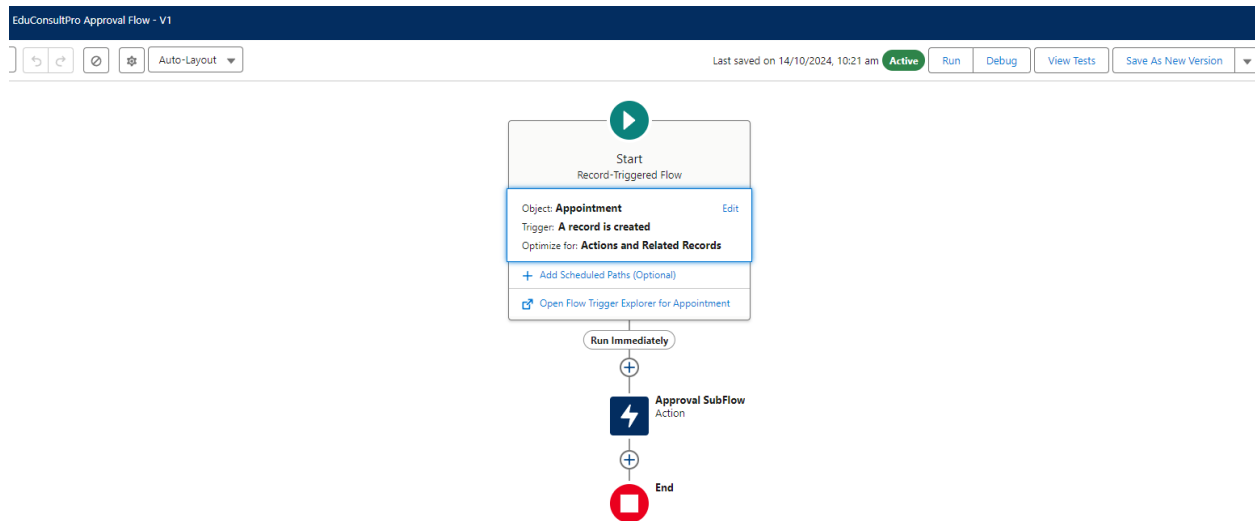
## Create a Record Triggered Flow:

### Configure the Start Element:

- From Setup, enter Flows in the Quick Find box, then select Flows.
- Click New Flow.
- Select Record-Triggered Flow.
- Click Create. The Configure Start window opens.
- For Object, select Appointment.
- For Trigger the Flow When, select A record is created.

### Add an Action Element:

- Add an Action element after the Start Element and Select the Submit for approval action, label it as "Approval SubFlow".
- Set the RecordId to "{!\$Record.Id}".
- Save the Flow, label it as "EduConsultPro Approval Flow and Click on Activate.



## Create a ScreenFlow for Existing Student to Book an Appointment:

### Add Screen Element:

- From Setup, enter Flow Builder in quick find, select new flow ? ScreenFlow.
- Add a Screen element.
- In the Screen Properties pane, for Label, enter “Get Student Info”.
- Add two Text components from the left side panel. Give the Label’s as follows:

1st Text Component Label : Enter Student Name

2nd Text Component Label : Enter Student Email

- Click on Done.

### Add GET Record Element:

- Add a GET Record Element after Decision Element, under the IELTS path and label it as “Get Rec”.
- Select Object : Student  
Condition Requirement : All Conditions are Met(AND)
  - A. Field : Student Name  
Operator : Equals  
Value : {!Enter\_Student\_Name}
  - B. Field : Email\_\_c  
Operator : Equals  
Value : {!Enter\_Student\_Email}

### **Add Screen Element:**

- From Setup, enter Flow Builder in quick find, select new flow ? ScreenFlow.
- Add a Screen element.
- In the Screen Properties pane, for Label, enter “Display Student Details”.
- Add Display Text components from the left side panel. Give the API name as “Display\_details”, under Resource picker add the below text:  
Name : {!Get\_Rec.Name},  
First Name : {!Get\_Rec.First\_Name\_\_c},  
Last Name : {!Get\_Rec.Last\_Name\_\_c},  
Email : {!Get\_Rec.Email\_\_c},  
Phone : {!Get\_Rec.Phone\_\_c},  
Gender : {!Get\_Rec.Gender\_\_c},  
City : {!Get\_Rec.City\_\_c},  
Address : {!Get\_Rec.Address\_\_c},
- Add a radio button component from the left side panel, label : How may I help you??
- Click on Add Choice ? type “Book an Appointment” in the input field ? click Create Book an Appointment choice.
- Repeat the above step and create an “Immigration Case” choice resource.

### **Add Decision Element:**

- Add a Decision Element after Select Display Student Details Element, label it as “Appointment or Case”.
- Under outcome label it as “Appointment” and write the condition such as below:

Resource : {!How\_may\_I\_Help\_you}

Operator : Equals

Value : {!Book\_an\_Appointment}

- Click on the “+” icon and Repeat the above step for Case options mentioned.

### **Add Screen Element:**

- Add a Screen element after the Decision Element and label it as “Appointment Booking Screen”.



- Click on Fields, click on the record variable input and create a new Resource (AppointmentRecordRes) to display all the fields which are in the Appointment object.
- Drag all the fields which are needed to add on the screen inorder to collect the student information.
- Click on Done.

#### **Add GET Record Element:**

- Add a GET Record Element after Decision Element, under the Appointment path and label it as “Get Consultant Rec”.
- Select Object : Consultant  
Condition Requirement : All Conditions are Met(AND)  
Field : Name  
Operator : Equals  
Value : {!AppointmentRecordRes.Consultant\_Name\_\_c}

#### **Create Appointment Record using Create Records Element:**

- Add a Create element after the Get Consultant Rec element and label it as “Create Appointment”.
- Select “one” under How many records to Create, and select “Use separate resources, and literal values” under How to Set the record fields.
- Select Object : Appointment
  - a. Field : Appointment\_DateTime\_\_c  
Value : {!AppointmentRecordRes.Appointment\_DateTime\_\_c}
  - b. Field : Consultant\_\_c  
Value : {!Get\_Constantant\_Rec.Id}
  - c. Field : Notes\_\_c  
Value : {!AppointmentRecordRes.Notes\_\_c}
  - d. Field : PurposeTopic\_\_c  
Value : {!AppointmentRecordRes.PurposeTopic\_\_c}
  - e. Field : Student\_Name\_\_c  
Value : {!Get\_Rec.Id}

#### **Add Screen Element:**

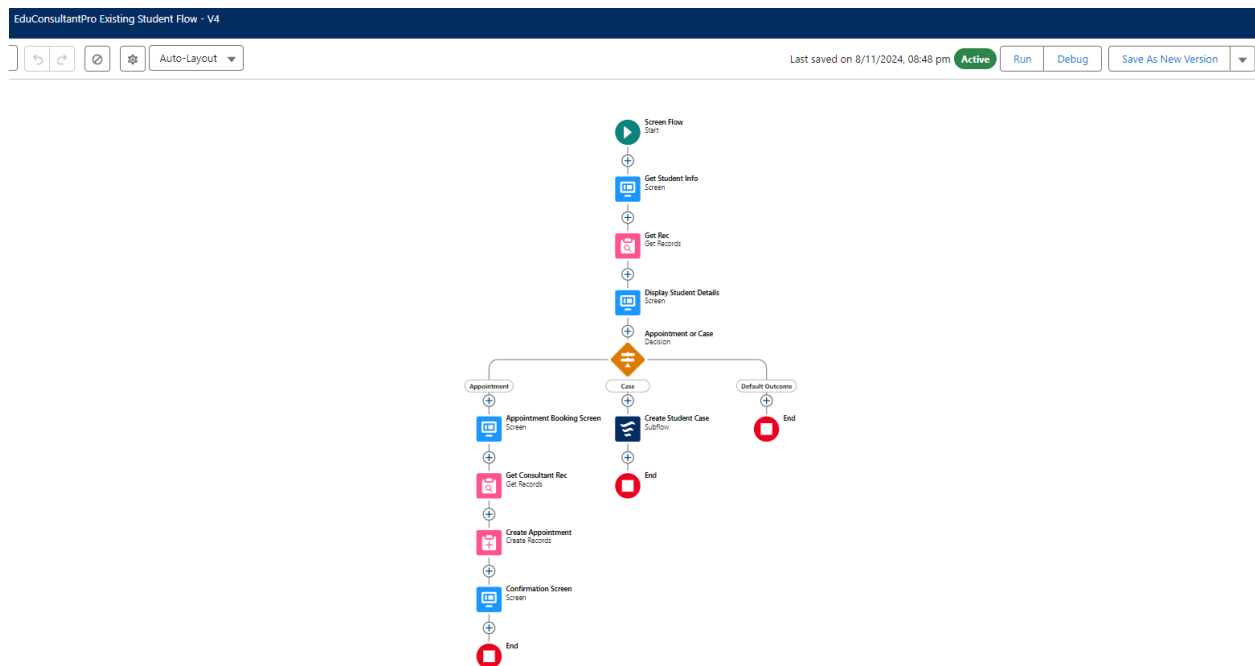
- Add a Screen Element after the Send Email to Student Action Element, label it as “Confirmation Screen”.
- From the left side panel search for the Display text component and drag it to the main panel, label it as “Appointment\_Confirmation”.
- Paste the below in the Resource picker box.

Consultant Name : {!Get\_Constantant\_Rec.Name},  
Date & Time : {!AppointmentRecordRes.Appointment\_DateTime\_\_c},  
Notes : {!AppointmentRecordRes.Notes\_\_c},

- Click Done.

### Add an SubFlow Element:

- Add a subflow element after the Start Element and search and Select for “Create a Case”, label it as “Create Student Case”.
- Save the flow and label it as “EduConsultantPro Existing Student Flow”.



### Create a ScreenFlow to Combine all the flows at one place:

#### Add Screen Element:

- Add a Screen Element and label it as Welcome Screen.
- From the left side panel search for the Display text component and drag it to the main panel, label it as “SuccessMessage”.
- Paste the below in 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!”

- Click Done

#### **Add Screen Element:**

- Add a Screen Element after the Welcome Screen Element, label it as “Existing or New Student Confirmation Screen”.
- Add a radio button component from the left side panel,
- label : Are you a Existing Student
- Click on Add Choice --> type “Yes” in the input field --> click Create Yes choice.
- Repeat the above step and create an “No” choice resource.
- Click Done

#### **Add Decision Element:**

- Add a Decision Element after Existing or New Student Confirmation Screen Element, label it as “Decision 1”.
- Under outcome label it as “If Existing Student” and write the condition such as below:

Resource : {!Are\_you\_a\_Existing\_Student}

Operator : Equals

Value : {!Yes}

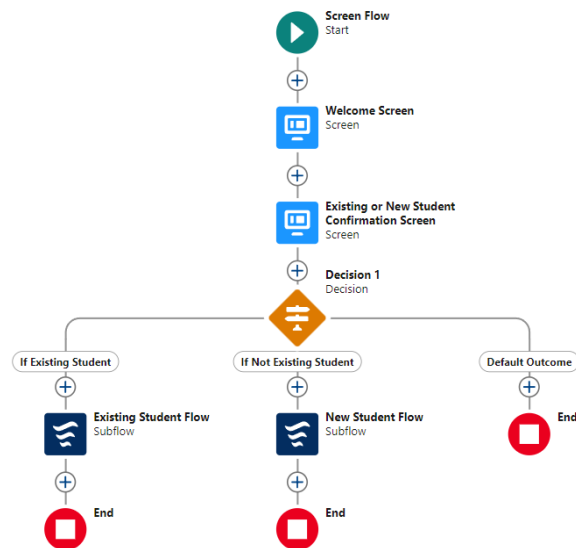
- Click on the “+” icon and Repeat the above step for No options mentioned.

### Add an SubFlow Element:

- Add a subflow element after the Decision 1 Element on the if Existing Student path and search and Select for “EduConsultantPro Existing Student Flow ”, label it as “Existing Student Flow”.
- Save the flow and label it as “EduConsultantPro Existing Student Flow”.
- Click Done

### Add an SubFlow Element:

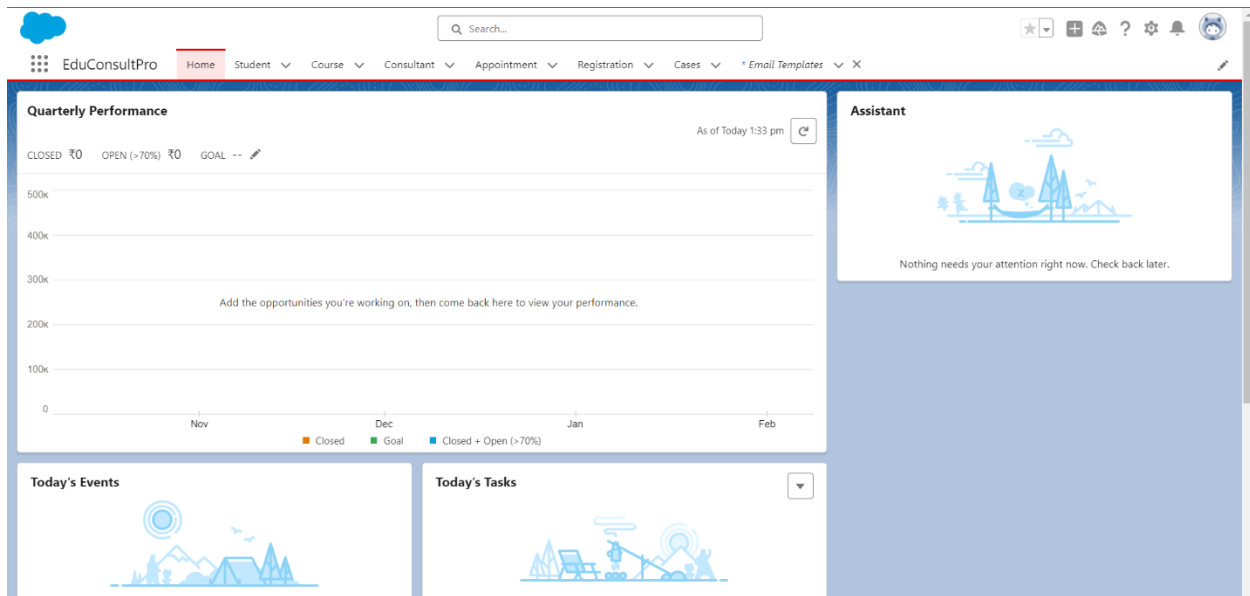
- Add a subflow element after the Decision 1 Element on the if Not an Existing Student path and search and Select for “EduConsultantPro Student Flow ”, label it as “New Student Flow”.
- Save the flow and label it as “EduConsultantPro Existing Student Flow”.
- Click Done.
- Save the flow and label it as “EduConsultPro Flow”.



Create a lightning app page:

Create a lightning app page:

- From Setup, enter App Builder in the Quick Find box, then click Lightning App Builder.
- Click New, select Home Page, then click Next.
- Step through the wizard and name the page “EduConsultPro Home Page”, select the Standard Home Page template, and then click Done.
- Drag the Flow component to the top-right region.
- Search for the “EduConsultantPro Flow” and click Save.
- Click Activate, Click App and Profile, then click Assign to Apps and Profiles.
- Select the Sales app, then click Next.
- Scroll down the list of profiles and select System Administrator, then click Next.
- Review the assignment, and then click Save.



## Testing and Validation

### User Interface Testing:

- Testing the functionality of picklists, form submissions, and dynamic field updates.

## Key Scenarios Addressed by Salesforce in the Implementation Project

- **Appointment Scheduling:** Automated scheduling and notifications.
- **Service Tracking:** Real-time updates and tracking of service interactions.

- **Consultant Management:** Easy selection and assignment of consultants to appointments.

## Conclusion

### Summary of Achievements:

- Successfully created a CRM application that streamlines service management.
- Enhanced operational efficiency and user experience.
- Provided real-time data accuracy and reporting capabilities.