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

This project document outlines the plan, design, and implementation of a CRM (Customer Relationship Management) application tailored for managing the services offered by an institution. The objective of this CRM application is to streamline operations, improve customer interactions, and enhance service management through a unified platform.
The purpose of this project is to design and develop a CRM application for institutions (educational, healthcare, or service-oriented) to efficiently manage their offered services. The CRM will help track customer interactions, manage service requests, and facilitate internal workflows.

**Scope**

This CRM system will be implemented to manage:

- Customer inquiries and relationships
- Service offerings (enrollments, appointments, or requests)
- Communication between the institution and its customers (students, clients, patients, etc.)

Creating a **Course** Object in Salesforce:
To create a Course object in Salesforce, you can use Salesforce's Object Manager to set up a custom object that will hold all the information related to courses. Below are the detailed steps to create the Course custom object, including adding fields, relationships, and setting up page layouts.
Step-by-Step Guide to Creating a Course Object in Salesforce
1. Log into Salesforce
- Open your web browser and log into your Salesforce account.
- Navigate to the Salesforce Setup area by clicking the gear icon in the top right corner and selecting Setup.
2. Create a New Custom Object
1. Access Object Manager:
  - In Setup, type "Object Manager" in the Quick Find box.
  - Click on Object Manager.
2. Create a New Object:
  - In Object Manager, click on the Create button in the top right and select Custom

Object.
3. Enter Course Object Details:
- Label: Enter "Course" (This is the name that users will see).
- Plural Label: Enter "Courses".
- Object Name: The API name will auto-populate as "Course".
- Record Name: You can choose a Text or Auto Number for the record name. If using Text, you might call it "Course Name." If using Auto Number, set the format (e.g., "Course-{0000}").
- Data Type: Keep it as Text for the Course Name or configure as per your needs.
- Allow Reports: Check this box if you want to allow reports on the Course object.
- Track Activities: Check this box to enable tasks and activities.
- Launch New Custom Tab Wizard after saving this custom object: Keep this checked if you want to create a tab for easy access to the Course object.
- Click Save.

3. Configure Course Object Fields

After creating the Course object, you will need to add custom fields that will capture the necessary course-related information.

1. Create Custom Fields:
- In the Course Object, go to the Fields & Relationships tab.
- Click New to add a new field.

2. Add Key Fields for the Course Object (Examples):
- Course Code: Text field (e.g., "CS101")
- Course Description: Long Text Area (for detailed information about the course)
- Start Date: Date field (to capture when the course starts)
- End Date: Date field (to capture when the course ends)
- Instructor: Lookup Relationship (if you have an Instructor object or use a Contact)
- Course Capacity: Number (to capture the maximum number of students)
- Credit Hours: Number (to capture how many credit hours the course is worth)
- For each field:
  - Choose Data Type (e.g., Text, Number, Date, Lookup).
  - Provide a Field Label (e.g., "Course Code").
  - Configure Field Settings (e.g., required, unique, help text).
  - Click Save & New to create more fields.

4. Create Relationships (Optional)

If you need to relate the Course object to other objects (e.g., Students, Instructors), you can create Lookup or Master-Detail Relationships.

1. Create Lookup Relationships (e.g., to connect with Students or Instructors):

- In the Course Object, go to Fields & Relationships.
- Click New and select Lookup Relationship.
- Choose the object you want to relate (e.g., Student or Instructor).
- Follow the wizard to complete the relationship setup and define the lookup behavior.

2. Create Master-Detail Relationships:
- Master-Detail relationships enforce tight linking between Course and other objects (e.g., related student enrollments).

5. Create a Tab for the Course Object

1. After creating the Course object, you will be prompted by the Custom Tab Wizard.
2. Select a tab style that represents the Course object (e.g., book icon).
3. Click Next and assign the tab to the appropriate profiles so that users can access it.
4. Click Save.

6. Page Layout Configuration

1. Go to the Page Layouts section in the Course object settings.
2. Customize the Layout:
- Add or remove fields based on your organization's needs.
- You can drag fields to different sections of the layout (e.g., Course Information, Course Schedule).
- Set field visibility or required status based on user roles.
3. Add Related Lists:
- If you created relationships (e.g., Student Enrollment), add the related lists to display relevant information on the Course detail page.
4. Click Save.

7. Validation Rules (Optional)

To ensure data quality, you can add Validation Rules that enforce certain conditions. For example:
- Ensure that the End Date is after the Start Date.
- Validate that the Course Capacity is greater than zero.

1. In the Course Object, go to Validation Rules.
2. Click New and configure the rule logic (e.g., `EndDate > StartDate`).
3. Click Save.

8. Create Sample Records

Once your Course object is set up, create sample records to test the object and ensure everything works as expected.

1. Navigate to the App Launcher and search for Courses.
2. Click New to create a Course record.

3. Fill out the required fields, such as Course Name, Course Code, and other custom fields.
4. Click Save.
9. Set Up Reports and Dashboards (Optional)
To track courses, you can create custom Reports and Dashboards:
1. Navigate to the Reports tab.
2. Click New Report and select Courses as the report type.
3. Configure filters, groupings, and charts to create insightful reports about your courses (e.g., courses by instructor, courses starting next month).
10. Deploy and Test

1. Test the Object:
- Test all the fields, relationships, and validations by creating multiple Course records.
- Ensure that all field values are stored correctly and that lookup relationships work as expected.
2. Deploy in Production (if testing in Sandbox):
- After testing, deploy the Course object to your production environment.
- Ensure that all user profiles have the necessary permissions to view and edit the Course object.

# Create a ScreenFlow for Student Admission Application process.

To create a Screen Flow for the Student Admission Application process in Salesforce, you can follow the steps below. The Screen Flow will guide users through the application process, collect data from the applicant, and create a new Student record in Salesforce.
Step-by-Step Guide for Creating a Screen Flow for the Student Admission Application Process
1. Log into Salesforce and Open Flow Builder
1. Log in to Salesforce:
- Open your web browser and log in to Salesforce.
2. Access Flow Builder:
- Click on the gear icon in the top-right corner and select Setup.
- In the Quick Find box, type Flows and select Flows under the Process Automation section.

- Click New Flow.

2. Select Flow Type

1. Choose Flow Type:
   - In the Flow Builder screen, select Screen Flow.
   - Click Create.

3. Define the Flow Start Point

1. Choose Flow Start:
   - In the Start element, you can specify when the flow should start. For a screen flow, no immediate configuration is required at this point.

4. Add Screens for Student Application Data Collection

You will add multiple screens to collect various details from the applicant. Each screen will contain fields that correspond to the fields of the Student object.

Screen 1: Personal Information

1. Add First Screen:
   - Drag a Screen element from the palette on the left into the flow canvas.
   - Name the screen (e.g., Personal Information).
2. Add Input Fields:
   - Drag and drop Text components for each field (e.g., First Name, Last Name, Email, Phone).
   - Configure the Text Components:
     - For First Name: Provide the API Name as `FirstName` and label it First Name.
     - For Last Name: Provide the API Name as `LastName` and label it Last Name.
     - For Email: Use a Email input component to capture the applicant’s email.
     - For Phone: Use a Phone input component for capturing the phone number.
3. Set Required Fields:
   - Set the First Name, Last Name, and Email fields as required by checking the Required box.
4. Click Done.

Screen 2: Academic Information

1. Add Another Screen:
   - Drag a Screen element from the palette and drop it after the first screen.
   - Name the screen (e.g., Academic Information).
2. Add Input Fields:
   - Add Text components or Picklist components for academic details:
     - Major: Use a Picklist for the applicant to select their intended major (create the picklist choices within the flow).
     - GPA: Use a Number input to capture the applicant's GPA.

- Graduation Year: Use a Date input to capture the expected graduation year.

3. Click Done.

Screen 3: Additional Information

1. Add a Final Screen:
   - Drag a Screen element for any additional information needed, such as a Comments or Essay field.
   - Use a Long Text Area component for comments or essays.
2. Click Done.

5. Create Records Based on Collected Data

After collecting the information through screens, you need to create a Student record using the data entered by the user.

1. Create Records Element:
   - Drag a Create Records element onto the canvas after the last screen.
   - Label the element Create Student Record.
2. Define the Record:
   - Select One for the number of records to create.
   - Choose the Student object.
3. Map Input Fields to Object Fields:
   - Map the flow input variables (from screens) to the corresponding fields in the Student object.
     - First Name → First Name (Student Object).
     - Last Name → Last Name (Student Object).
     - Email → Email (Student Object).
     - Phone → Phone (Student Object).
     - Major → Major (custom field on the Student object).
     - GPA → GPA (custom field on the Student object).
     - Graduation Year → Graduation Year (custom field on the Student object).
   4. Click Done.

6. Configure a Success Screen

After creating the student record, you may want to show a confirmation screen indicating that the application has been submitted successfully.

1. Add a Final Screen:
   - Drag another Screen element onto the canvas.
   - Label the screen Application Submitted.
  2. Add a Display Text Component:
   - Drag and drop a Display Text component.
   - Write a confirmation message like "Thank you! Your application has been submitted

successfully."
3. Click Done.

7. Configure Flow Navigation

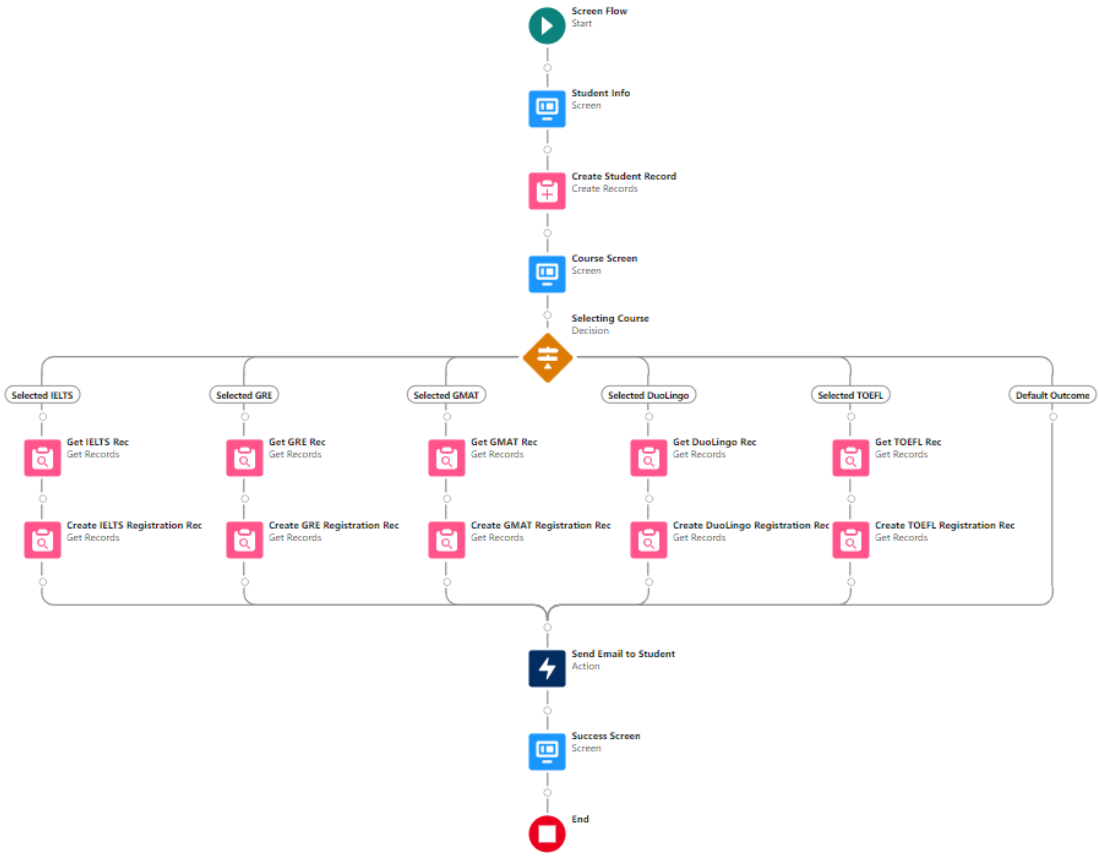
1. Connect Elements:
   - Ensure that all the screens and actions are connected in sequence:
     - Start → Personal Information → Academic Information → Additional Information → Create Student Record → Application Submitted.

8. Activate and Test the Flow

1. Save the Flow:
   - Click Save and name the flow (e.g., Student Admission Application).
2. Activate the Flow:
   - After saving, click Activate to make the flow available for use.
3. Test the Flow:
   - You can test the flow by running it in Debug Mode to see if all fields are working correctly and the student record is being created as expected.

9. Make the Flow Available for Users

1. Add Flow to a Page:
   - Go to App Builder to add the flow to a Lightning Page, Home Page, or Community age.
2. Add Flow to the App Launcher:
   - You can also make the flow available from the App Launcher so users can access it directly.




# Create Users

To create a user in Salesforce with a Standard Platform User profile, follow the steps below. The Standard Platform User profile is intended for users who need access to custom objects and apps within the platform but not to standard CRM objects like Accounts or Contacts.

Step-by-Step Guide to Create a User with a Standard Platform User Profile in Salesforce

1. Log into Salesforce

1. Open your browser and log into your Salesforce account.
2. Once logged in, click on the gear icon in the top-right corner and select Setup.

2. Navigate to Users

1. In the Quick Find box, type `Users` and select Users under the Users section.
2. This will open the User Management page, where you can view and manage existing users and add new users.

3. Click on New User

1. On the Users page, click the New User button to create a new user.
2. The New User form will open, allowing you to input details for the new user.

4. Fill in User Information

1. First Name: Enter the user's first name (optional).
2. Last Name: Enter the user's last name (required).
3. Email: Enter the user's email address.
4. Username: Enter a unique username for the user. The username must be in the format of an email address, but it doesn't have to be the same as the email address (e.g., `jane.doe@platformuser.com`).
5. Nickname: A nickname will be auto-generated, but you can modify it if needed.
6. Title: Optional field for the user's title (e.g., Developer, Administrator).
7. Company: Enter your company name if needed.
8. Department: Optional field to specify the department (e.g., IT, Sales).
9. Role: Assign a role to the user (optional).
10. User License: Select Salesforce Platform from the dropdown. This is the license for users who only need access to custom apps but not the full CRM functionality.
11. Profile: Select Standard Platform User from the Profile dropdown. This profile gives access to the platform's features, including custom objects, but not to standard CRM features like Leads or Opportunities.

5. Set Locale, Time Zone, and Language Preferences

1. Locale: Choose the locale that matches the user's location (e.g., English (United States)).
2. Time Zone: Select the appropriate time zone for the user.
3. Language: Set the preferred language for the user.
4. Email Encoding: Choose the preferred encoding (usually UTF-8).

6. Generate Password

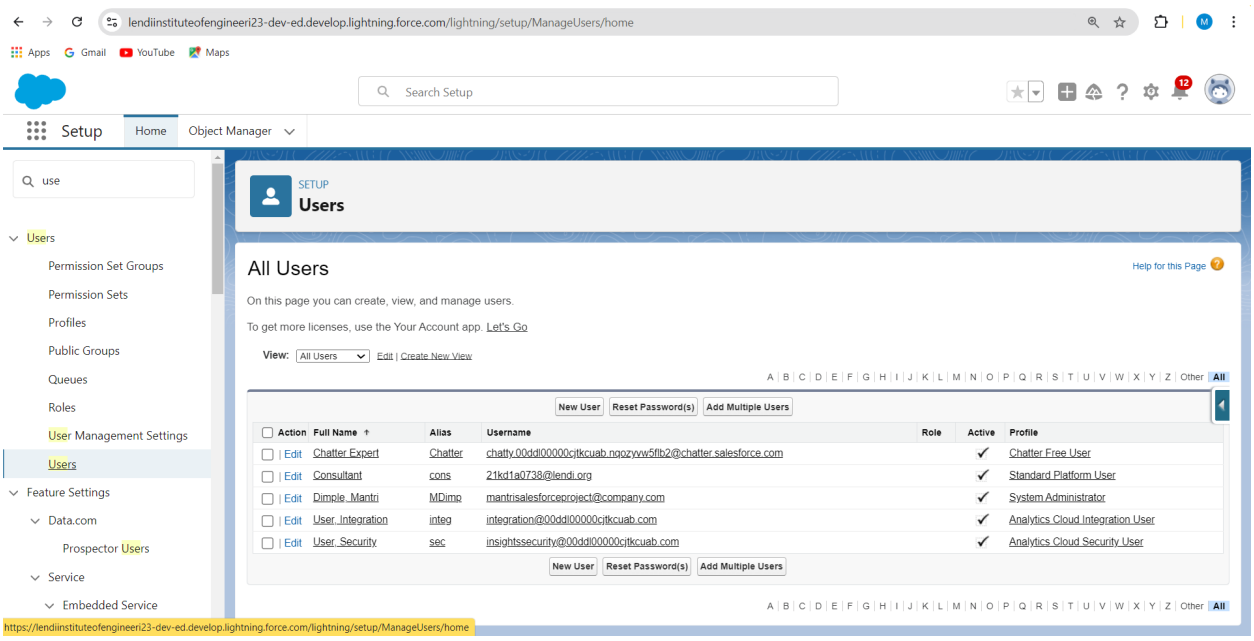
1. Generate Password and Notify User: Check this box to send the new user an email with a link to set their password and log in. If you don't want to notify the user immediately, leave it unchecked.

7. Save the User

1. Once all fields are filled in, click Save to create the new user.
2. If the Generate Password and Notify User option was checked, the user will receive an email with instructions to set up their password and log in.

8. Verify User Creation

1. After saving, you'll be returned to the Users page where you can see the newly created user in the list.
2. You can edit the user's details or deactivate them later if necessary.




# Create an Approval Process for Property Object

To create an Approval Process for the Property object in Salesforce, follow the step-by-step process outlined below. An approval process allows you to define steps in which records (in this case, property records) must be approved by designated approvers, ensuring a structured workflow for record approval.

Step-by-Step Guide to Create an Approval Process for the Property Object in Salesforce

1. Log into Salesforce and Open Setup

1. Log in to your Salesforce account.
2. Click on the gear icon in the top-right corner and select Setup to access the setup area.

2. Create a Custom Property Object (if not already created)

If you have not created the Property object, you will need to create it before setting up the approval process.

1. In the Quick Find box, type `Object Manager` and select Object Manager.
2. Click on Create → Custom Object.
   - Label: Property
   - Plural Label: Properties
   - Object Name: Property
   - Record Name: Property Name
   - Configure other settings (e.g., allow reports, activities, etc.) as required.
3. Click Save.

3. Define the Fields for Property Object

Make sure the Property object has the necessary fields that are relevant for approval. For example, you might want fields like Property Name, Location, Price, Approval Status, etc.

1. Navigate to Fields & Relationships under the Property object.
2. Create a field for Approval Status (Picklist) with values like:
   - Pending Approval
   - Approved
   - Rejected

4. Create an Approval Process

1. Navigate to Approval Processes:
   - In Setup, type `Approval Processes` in the Quick Find box and select Approval Processes under Process Automation.
2. Choose to Create a New Approval Process:
   - Click on Create New Approval Process.
   - Select Use Standard Setup Wizard (this wizard provides a more guided process).
   - Choose the Property object from the dropdown.

5. Define the Approval Process Details

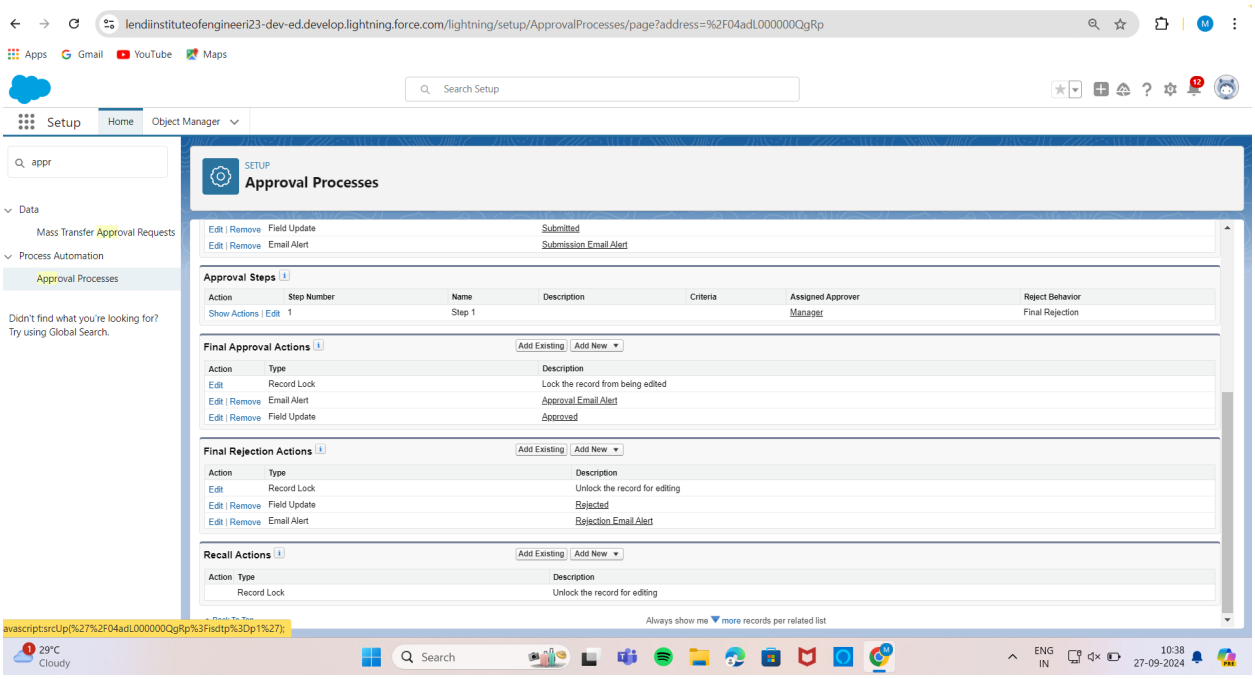
1. Process Name: Enter a name for the approval process (e.g., Property Approval Process).
2. Unique Name: This will auto-fill based on the process name.
3. Entry Criteria: Define the criteria that must be met for a property record to enter the approval process. For example, you might want to ensure that the Price field is not null or that the Approval Status is set to Pending Approval.
   - Criteria: Example: `Price > 0` or `Approval Status = Pending Approval`.
4. Specify Initial Submitters: Choose which users or roles can submit the property record for approval (e.g., Property Managers, System Administrators).
   - Choose options like Record Owner, Public Groups, or specific roles.
5. Click Next.

6. Define Approval Steps

Now, define the steps of the approval process, including who the approvers will be.

1. Step 1: Name:
   - Enter a name for the first step of the approval process (e.g., Initial Approval).
   2. Select Criteria for Entering this Step:
   - You can either set the step to always execute (no criteria) or define specific criteria that the record must meet to enter this step.
   - Example: Set criteria if required (e.g., `Price > 100,000` for high-value properties).

3. Assign Approvers:
   - Select the approver for this step. You can assign a specific user, the manager of the record owner, or use a custom hierarchy field.
   - Example: Choose Manager or assign a specific user or role, such as Property Manager.
4. Specify Approver Field:
   - Choose to allow users to manually select the next approver (optional).
5. Click Save.
9. Activate the Approval Process
1. After defining the steps, click Activate to make the approval process live.
2. Salesforce will ask for confirmation. Confirm the activation.
10. Test the Approval Process
1. Create a Test Property Record:
   - Navigate to the Property object and create a new record (make sure it meets the entry criteria for the approval process).
2. Submit for Approval:
   - Click the Submit for Approval button that should now be available on the property record page.
3. Check Approval Status:
   - Check that the approval status changes as the record moves through the approval process.
4. Approve or Reject:
   - Log in as the approver and approve or reject the record. Verify that the record’s Approval Status updates appropriately.




# Create a Record Triggered Flow

Creating a Record-Triggered Flow in Salesforce allows you to automate actions when records are created, updated, or deleted. This flow is executed automatically based on the conditions you set.

Use Case: Create a Record-Triggered Flow to update the status of a Property record when its Price is updated.Here is a step-by-step guide to creating a Record-Triggered Flow in Salesforce.

Step-by-Step Guide to Create a Record-Triggered Flow in Salesforce

1. Log into Salesforce and Access Flow Builder

1. Log in to Salesforce:
   - Open your web browser and log in to your Salesforce account.
2. Navigate to Flow Builder:
   - Click on the gear icon in the top-right corner and select Setup.
   - In the Quick Find box, type `Flows` and select Flows under Process Automation.
- Click on New Flow to start creating a new flow.

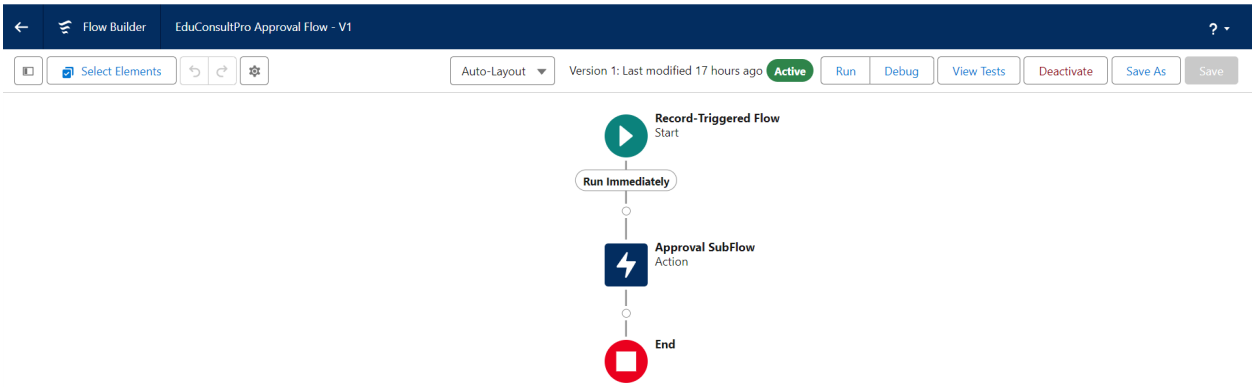
2. Select Flow Type

1. Select Flow Type:
   - In the Flow Builder, choose Record-Triggered Flow as the flow type.
   - Click Create.

3. Choose the Trigger for the Flow

1. Object:
   - Select the object that will trigger the flow. For this example, select the Property object (assuming it's already created).
2. Trigger Condition:
   - Choose the action that will trigger the flow. You can choose from the following options:
     - A record is created.
     - A record is updated.
     - A record is created or updated (this is useful for monitoring both events).
3. Condition:
   - Specify conditions for when the flow should run. For example, you can run the flow only if the Price field is updated.
   - Select Only when a record is updated to meet the condition requirements (if you're focusing on record updates).
   - Condition: Set the condition to check if the Price field is changed.
     - Field: Price
     - Operator: Is Changed
4. Click Done.
 4. Define the Flow Logic and Actions
1. Decision Element (Optional):
   - If you want to add logic to check certain criteria (e.g., if the price exceeds a certain threshold), you can use a Decision element.
   - Drag and drop a Decision element onto the canvas.
   - Label the decision (e.g., Price Threshold Check).
   - Set the Outcome 1 as follows:
     - Label: High Price
     - Condition: `Price > 500,000` (or any value you prefer).
   - The Default Outcome can be for prices that do not meet the condition.
2. Update Records Action:
   - Drag an Update Records action onto the canvas to update the Property Status based on the decision.
   - Label: Update Property Status.
   - Select the Property record that triggered the flow for updating.
   - Set Field Values: For example, set the Property Status to Premium for properties above a certain price.
     - Field: Property Status
     - Value: Premium (or any value based on your business logic).

3. Connect Elements:
   - Connect the trigger (Start element) to the Decision element.
   - Connect the High Price outcome of the decision to the Update Records action.
   - You can also add more actions based on different outcomes or paths.
 5. Save and Activate the Flow
1. Save the Flow:
   - Click on Save.
   - Name the flow (e.g., Property Price Update Flow).
   - Click Save again.
2. Activate the Flow:
   - After saving the flow, click Activate to make it live. Once activated, the flow will be triggered automatically based on the conditions you set.
 6. Test the Flow
1. Create or Update a Property Record:
   - Navigate to the Property object and create a new record or update an existing record.
   - Modify the Price field to meet the condition you set in the flow (e.g., set the price above $500,000).
2. Check if the Flow Executes:
   - After saving the record, check if the Property Status is updated as per the logic defined in the flow.
 7. Monitor the Flow's Performance
1. Flow Execution Logs:
   - You can monitor the flow's execution through the Flow Details page.
   - Navigate to Setup, type `Flows` in the Quick Find box, and select Flows.
   - From the list of flows, you can check the Flow Versions and see any error logs or execution history to monitor the flow's performance.



# Create a ScreenFlow for Existing Student to Book an Appointment

Creating a Screen Flow in Salesforce for existing students to book an appointment involves several steps. This flow will guide users through a series of screens to collect the necessary information for booking an appointment. Below is a step-by-step guide to help you set this up.

Step-by-Step Guide to Create a Screen Flow for Existing Students to Book an Appointment in Salesforce

1. Log into Salesforce and Access Flow Builder

1. Log in to Salesforce:
   - Open your web browser and log in to your Salesforce account.
2. Navigate to Flow Builder:
   - Click on the gear icon in the top-right corner and select Setup.
   - In the Quick Find box, type `Flows` and select Flows under Process Automation.
   - Click on New Flow to start creating a new flow.

2. Select Flow Type

1. Choose Flow Type:
   - Select Screen Flow as the flow type.
   - Click Create.

3. Set Up Flow Properties

1. Flow Properties:
   - Give your flow a meaningful name (e.g., Student Appointment Booking).
   - Optionally, add a description (e.g., "Flow for existing students to book an appointment").
   - Set the Flow Type to Screen Flow.
   - Click Done.

4. Add a Screen to Capture Student Information

1. Drag a Screen Element:
   - Drag a Screen element from the toolbox onto the flow canvas.
   - Label the screen (e.g., Student Information).
2. Add Input Fields:
   - Drag and drop the following components onto the screen:
     - Input Field: For Student Name (Text Input).
       - Field Label: Student Name

- Variable: Create a new variable (e.g., `varStudentName`).
- Input Field: For Email Address (Email Input).
- Field Label: Email Address
- Variable: Create a new variable (e.g., `varEmailAddress`).
- Input Field: For Preferred Appointment Date (Date Input).
- Field Label: Preferred Appointment Date
- Variable: Create a new variable (e.g., `varAppointmentDate`).
- Input Field: For Appointment Time (Text Input).
- Field Label: Preferred Appointment Time
- Variable: Create a new variable (e.g., `varAppointmentTime`).

3. Click Done to save the screen.

5. Add a Screen for Appointment Confirmation

1. Drag Another Screen Element:
- Drag another Screen element onto the canvas.
- Label this screen (e.g., Confirm Appointment).
2. Add Confirmation Message:
- Drag a Display Text component onto the screen.
- Set the text to something like:
Thank you, {!varStudentName}! Your appointment has been booked for {!varAppointmentDate} at {!varAppointmentTime}.
3. Add a Button:
- Add a Button to allow students to finish the process.
- Label the button (e.g., Finish).
4. Click Done to save the confirmation screen.

6. Add Logic to Store Appointment Data

1. Create an Appointment Record:
- If you have a custom object (e.g., Appointments) to store appointment information, you can add a Create Records element after the confirmation screen.
- Drag the Create Records element onto the canvas.
- Label it (e.g., Create Appointment Record).
- Select the Object (e.g., Appointments).
- Map the fields from the flow variables:
- Student Name → `{!varStudentName}`
- Email Address → `{!varEmailAddress}`
- Appointment Date → `{!varAppointmentDate}`
- Appointment Time → `{!varAppointmentTime}`
2. Click Done to save this element.

7. Connect the Flow Elements

1. Connect the Elements:

- Connect the first Screen element (Student Information) to the Confirm Appointment screen.
- Connect the Confirm Appointment screen to the Create Appointment Record action.
- Optionally, connect the Create Appointment Record to an end screen or the finish button.

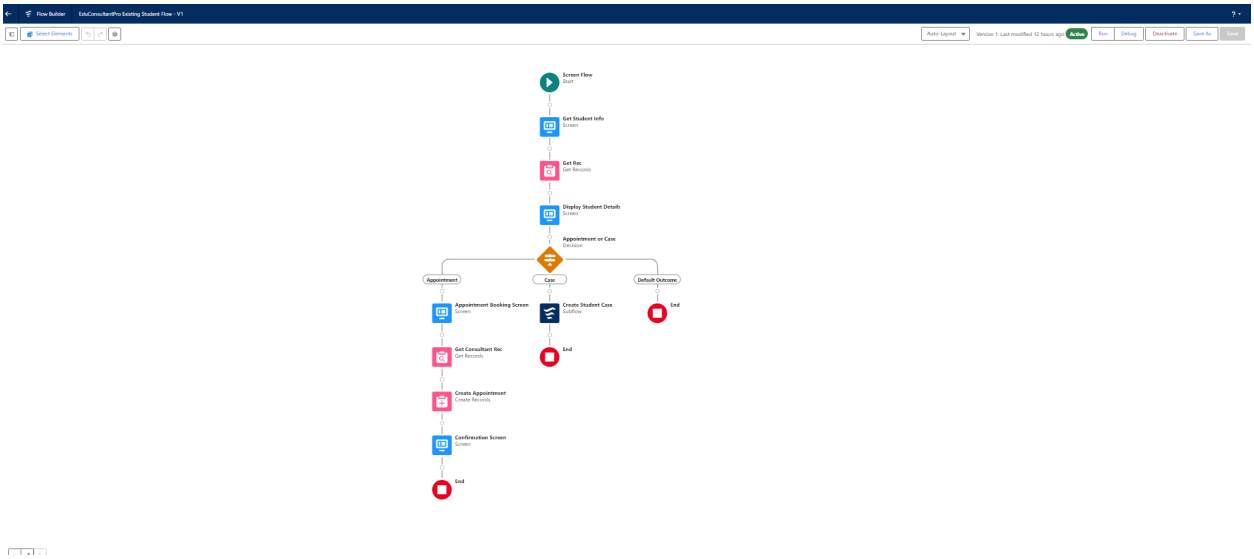
8. Save and Activate the Flow

1. Save the Flow:

- Click on Save.
- Provide a name (e.g., Student Appointment Booking).

2. Activate the Flow:

- After saving, click Activate to make the flow available for use.




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

Creating a Screen Flow in Salesforce that combines multiple flows into one allows users to access various functionalities from a single interface. This is especially useful for scenarios where you want to guide users through different processes sequentially. Below is a step-by-step guide to creating a Master Screen Flow that combines various sub-flows.

Step-by-Step Guide to Create a Master Screen Flow in Salesforce

1. Log into Salesforce and Access Flow Builder

1. Log in to Salesforce:
   - Open your web browser and log in to your Salesforce account.
2. Navigate to Flow Builder:
   - Click on the gear icon in the top-right corner and select Setup.
   - In the Quick Find box, type `Flows` and select Flows under Process Automation.
   - Click on New Flow to start creating a new flow.
 2. Select Flow Type
1. Choose Flow Type:
   - Select Screen Flow as the flow type.
   - Click Create.
 3. Set Up Flow Properties
1. Flow Properties:
   - Give your flow a meaningful name (e.g., Master Flow for Student Services).
   - Optionally, add a description (e.g., "Combines multiple flows for student services into one").
   - Set the Flow Type to Screen Flow.
   - Click Done.
 4. Add a Welcome Screen
1. Drag a Screen Element:
   - Drag a Screen element from the toolbox onto the flow canvas.
   - Label the screen (e.g., Welcome to Student Services).
2. Add Text:
   - Drag a Display Text component onto the screen.
   - Set the text to a welcome message (e.g., "Welcome! Please select the service you would like to access.").
3. Add Radio Buttons for Options:
   - Drag a Radio Buttons component onto the screen.
   - Label: Service Selection
   - Choices:
     - Option 1: Book an Appointment
     - Option 2: Submit a Course Request
     - Option 3: View Grades
   - Create a new variable (e.g., `varServiceChoice`) to store the selected option.
4. Click Done to save the screen.
 5. Add Decision Element to Determine Flow Path
1. Drag a Decision Element:
   - Drag a Decision element onto the canvas.

- Label it (e.g., Select Service).
2. Configure Outcomes:
- Outcome 1:
- Label: Book Appointment
- Condition: `{!varServiceChoice} Equals Book an Appointment`
- Outcome 2:
- Label: Submit Course Request
- Condition: `{!varServiceChoice} Equals Submit a Course Request`
- Outcome 3:
- Label: View Grades
- Condition: `{!varServiceChoice} Equals View Grades`
- Set a Default Outcome to handle unexpected selections.
3. Click Done to save the decision element.
6. Add Sub-Flows for Each Service
1. Add the Sub-Flow for Booking Appointments:
- Drag a Subflow element onto the canvas.
- Label it (e.g., Book Appointment).
- Choose the existing flow that handles appointment bookings.
- Connect the Book Appointment outcome from the decision to this subflow.
2. Add the Sub-Flow for Course Requests:
- Drag another Subflow element onto the canvas.
- Label it (e.g., Submit Course Request).
- Choose the existing flow that handles course requests.
- Connect the Submit Course Request outcome from the decision to this subflow.
3. Add the Sub-Flow for Viewing Grades:
- Drag another Subflow element onto the canvas.
- Label it (e.g., View Grades).
- Choose the existing flow that handles viewing grades.
- Connect the View Grades outcome from the decision to this subflow.
7. Connect the Flows and Add Finish Screen
1. Connect All Elements:
- Connect the Welcome Screen to the Select Service decision element.
- Connect each outcome from the Select Service decision element to its corresponding subflow.
- After each subflow, connect to a final Finish screen or a Confirmation Screen to thank the user for their action.
2. Add Finish Screen:

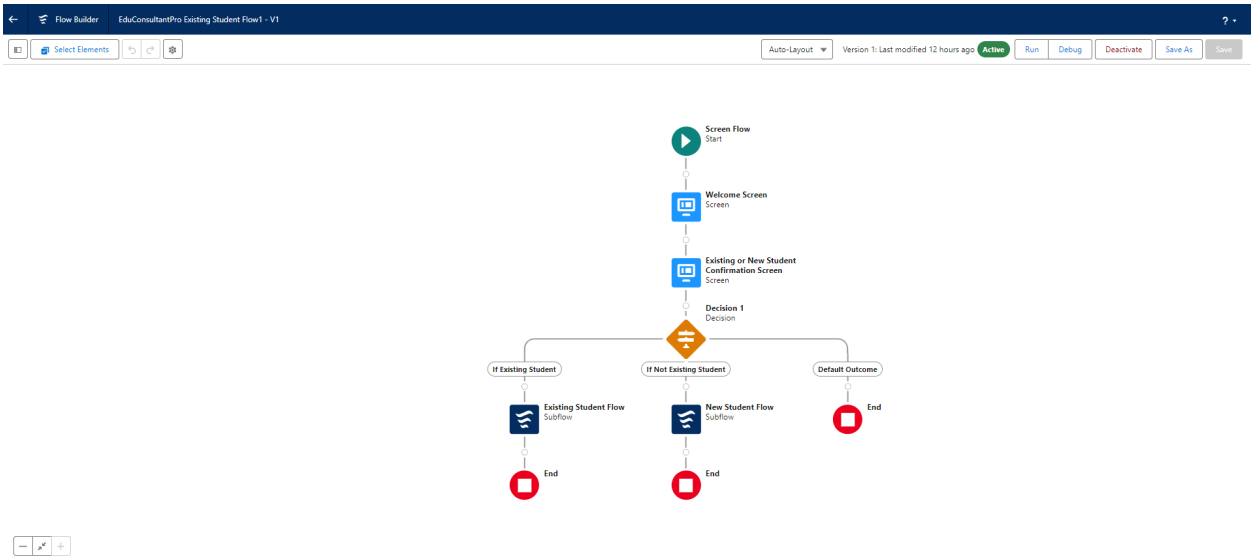
- Drag a Screen element for the finish step.
- Label it (e.g., Thank You).
- Add a Display Text component thanking the user for using the service.

3. Click Done to save the finish screen.

8. Save and Activate the Master Flow

1. Save the Flow:
- Click on Save.
- Provide a name (e.g., Master Flow for Student Services).

2. Activate the Flow:
- After saving, click Activate to make the flow available for use.




# Create a lightning app page

Creating a Lightning App Page in Salesforce allows you to customize the user interface and make it easier for users to access and manage their tasks. Here's a step-by-step guide to creating a Lightning App Page and making it available in your Salesforce application.

Step-by-Step Guide to Create a Lightning App Page

1. Log into Salesforce

1. Open your web browser and log in to your Salesforce account.

2. Access the Lightning App Builder

1. Navigate to Setup:
- Click on the gear icon in the top-right corner and select Setup.

2. Find the Lightning App Builder:

- In the Quick Find box, type `Lightning App Builder`.
- Click on Lightning App Builder.

3. Create a New Lightning App Page

1. Click on New:
   - In the Lightning App Builder, click on the New button to create a new page.
2. Select Page Type:
   - Choose App Page as the type of page you want to create.
   - Click Next.
3. Name Your Page:
   - Enter a name for your app page (e.g., Student Services Page).
   - Optionally, provide a description.
   - Click Next.
4. Choose a Layout:
   - Select a layout for your app page (e.g., One Region, Two Regions, etc.).
   - Click Finish to create the page.

4. Customize Your App Page

1. Add Components:
   - In the Lightning App Builder interface, you will see a component panel on the left side. You can drag and drop standard or custom components onto your page.
   - For example:
     - Record Pages: Add a record page for Students, Appointments, etc.
     - Reports: Add a report component to display relevant data.
     - Flow: Drag a flow component if you have created flows (like the Master Flow for Student Services).
     - Custom Components: If you have any custom components, you can add those as well.
2. Configure Components:
   - Click on each component you add to configure its settings (e.g., selecting which record to display, setting up filters, etc.).
3. Preview Your Page:
   - Use the Preview button to see how your app page looks and functions.

5. Save and Activate the App Page

1. Save the Page:
   - Click on the Save button in the top-right corner.
2. Activate the Page:
   - Click on the Activation button next to the Save button.
   - In the activation settings, you can choose where to make this app page available.

3. Select Availability:

- App: Select the app where you want the page to be available (e.g., Salesforce App, Custom App).
- Record Types: Choose any record types if needed.
- Profiles: You can also specify which user profiles can access the page.
- Click Next to proceed.

4. Final Activation Settings:

- Review your settings and click Save to activate the app page.

6. Access the Lightning App Page

1. Navigate to Your App:

- Click on the App Launcher (grid icon) in the top-left corner and select the app where you made the page available.

2. Find Your App Page:

- You should see the newly created app page available in the app. Click on it to access the features and components you added.