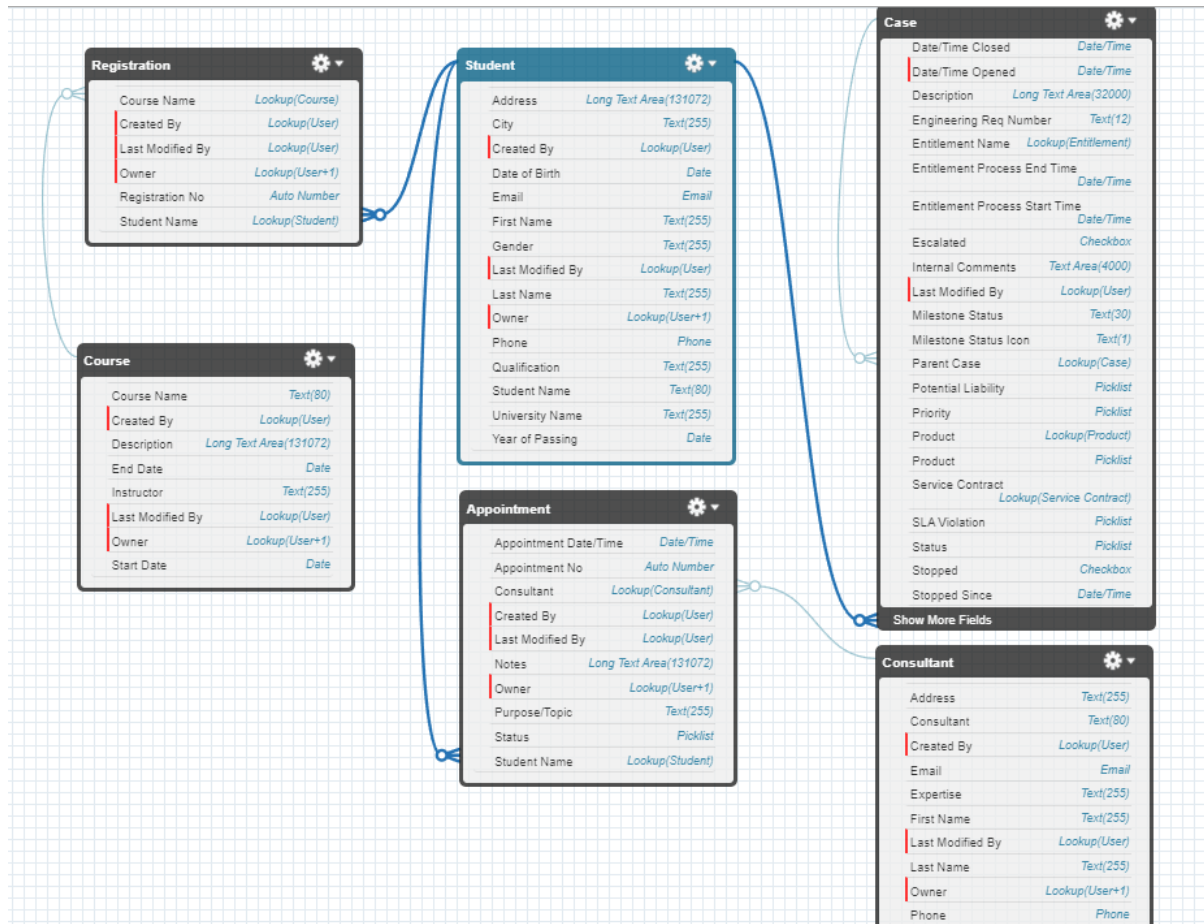


Milestone 1:- Create Objects from Spreadsheet.

Create Relationship among the objects



Milestone 2:- Create a Screen Flow for Student Admission Application process.

Add Screen Element

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

EduConsultantPro Student Flow

First Name

Last Name

Email

Phone

Screen Properties

* Label

Student Info

* API Name ⓘ

Student_Info

Description

> Configure Header

> Configure Footer

Cancel

Done

Create Student Record using Create Element

Create Records

* Label

Create Student Record

* API Name ⓘ

Create_Student_Record

Description

* How to set record field values

From a Record Variable

How Many Records to Create

☒ One

☐ Multiple

Create a Record from These Values

* Record

StudentRecordRes

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

Add Screen Element

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

EduConsultantPro Student Flow

Picklist

Select Course

--None--

Pause

Previous

Finish

Picklist

Picklist

* Choice

{!IELTS}

* Choice

{!GRE}

* Choice

{!GMAT}

* Choice

{!Duolingo}

* Choice

{!TOEFL}

Cancel

Done

Add Decision Element

Decision

* Label

Selecting Course

* API Name

SelectingCourse

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

Selected IELTS

Selected GRE

Selected GMAT

Selected Duolingo

Selected TOEFL

Default Outcome

OUTCOME DETAILS

Delete Outcome

* Label

Selected IELTS

* Outcome API Name

Selected_IELTS

Condition Requirements to Execute Outcome

All Conditions Are Met (AND)

Resource

Course Screen > Select_Course

Operator


Equals

Value

IELTS

+ Add Condition

Add GET Record Element

 Get Records ×

* Label

Get IELTS Rec

* API Name ⓘ

Get_IELTS_Rec

Description

Get Records of This Object


* Object

Course

Filter Course Records

Condition Requirements

All Conditions Are Met (AND) ▼


Field	Operator	Value	
Course_Name__c	Equals ▼	<div>Aa Select_Course X</div>	

+ Add Condition

Sort Course Records


Sort Order

Create Registration Record using Create Records Element

 Create Records ×

* Label


Create IELTS Registration Rec

* API Name 

Create_IELTS_Registration_Rec

Description

* How to set record field values

Manually 

Create a Record of This Object

* Object

Registration


Set Field Values for the Registration


Field

Course_Name__c

←

Value

Aa Course from Get_IELTS_Rec > Record ID 





Field

Student_Name__c

←

Value

Aa StudentRecordRes > Record ID 



+ Add Field

Create Email Text Template Variables For Email Body And Subject

Edit Text Template

* API Name ⓘ

StuRegistrationEmailTextTempSub

Description

* Body ⓘ

Insert a resource... 🔍

View as Plain Text ▼

Dear (!StudentRecordRes.Name),

Congratulations and welcome to EduConsultantPro!

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

At EduConsultantPro, we understand the importance of your academic and career goals, and we are committed to providing you with the highest level of support and guidance throughout your journey.

Here are a few key points to help you get started:

Explore Our Resources : Take some time to explore the wide range of resources, tools, and services available on the

Cancel

Done

Add an action Element



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

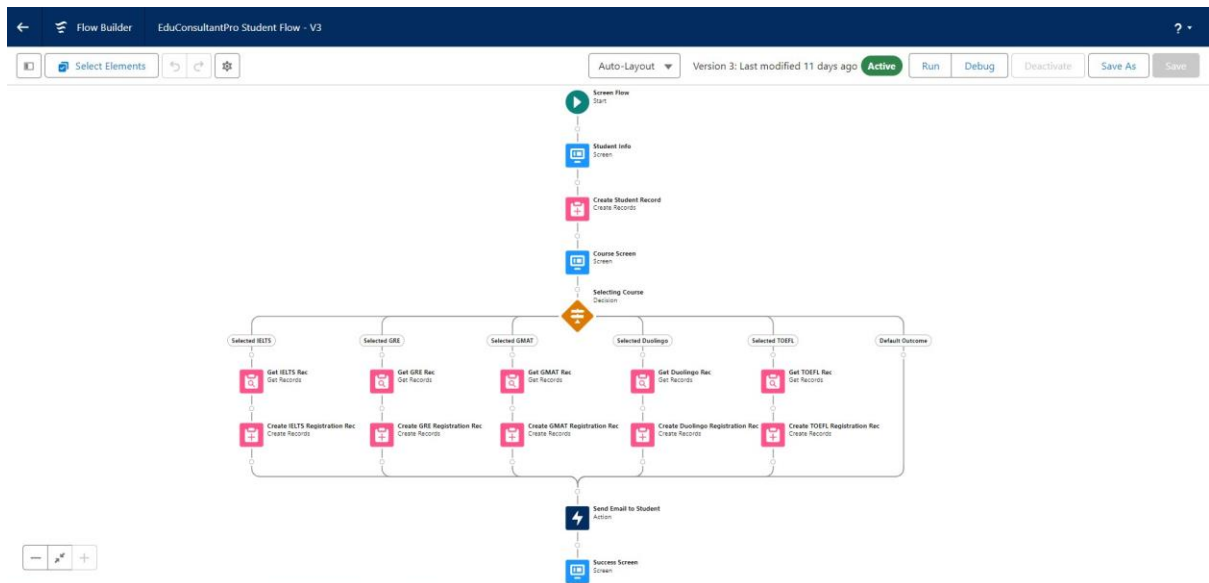
A_a Body ⓘ

📄 StuRegistrationEmailTextTempBody X



Included

Add screen element



Milestone 3:- Create Users

Configure the User Settings

Approver Settings

Delegated Approver

Manager

Gayathri Saxena

Receive Approval Request Emails

Only if I am an approver

☐ Generate new password and notify user immediately

Save

Save & New

Cancel

Milestone 4:- Create an Approval Process for Property Object

Create an Email Template

Initial Submission Actions ¹			Add Existing	Add New [▼]
Action	Type	Description		
	Record Lock	Lock the record		Task
Edit Remove	Field Update	Update the field		Email Alert
Edit Remove	Email Alert	Send an email alert		Field Update
		Submit the record		Outbound Message
		Submission Email Alert		

Milestone 5 :- Create a Record Triggered Flow

Configure the Start Element

Configure Start

Select Object

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

* Object

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

* Optimize the Flow for:

Fast Field Updates


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

Actions and Related Records

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

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

Add an action element

 Edit Submit for Approval
approval subflow (*approval_subflow*)

* Label

approval subflow


* API Name

approval_subflow

Description

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

Set Input Values for the Selected Action

A_a * Record ID 

{!\$Record.Id}

A_a Approval Process Name Or ID

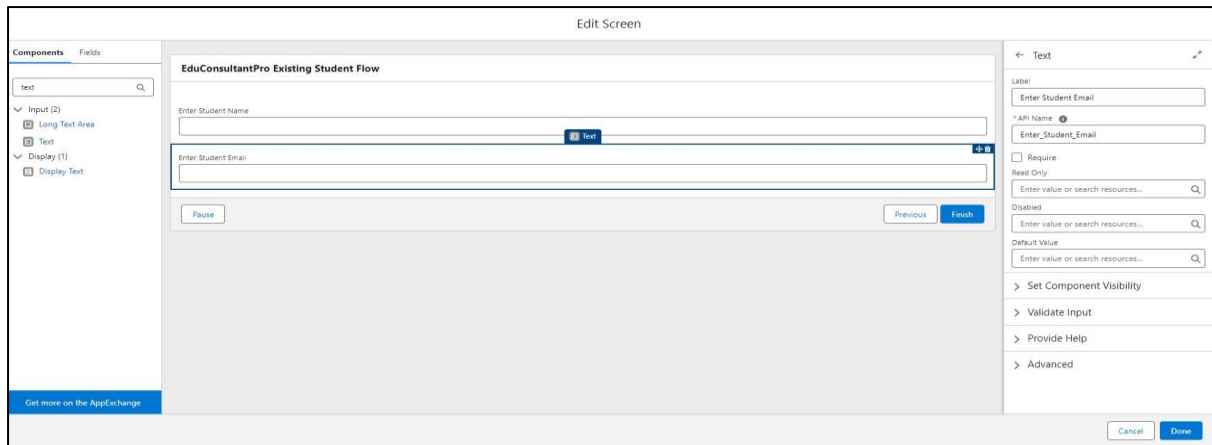
Don't Include

A_a Next Approver IDs

Don't Include

Milestone6:-Create a ScreenFlow for Existing Student to Book an Appointment

Add Screen Element



Add a Get record element

Get Records
✕

* Label

* API Name ⓘ

Description

Get Records of This Object

* Object

Filter Student Records

Condition Requirements

All Conditions Are Met (AND) ▼

Field	Operator	Value
Student_Name__c	Equals ▼	<input type="text" value="Enter_Student_Name"/> ✕
AND Email__c	Equals ▼	<input type="text" value="Enter_Student_Email"/> ✕

+ Add Condition

Sort Student Records

Sort Order

Add a Decision Element

Decision

* Label

Appointment or Case

* API Name

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

+

Appointment

Case

Default Outcome

OUTCOME DETAILS

* Label

Appointment

* Outcome API Name

Appointment

Condition Requirements to Execute Outcome

All Conditions Are Met (AND)

Resource

A ...Details > How_may_I_Help_you

Operator

Equals

Value

A Book_an_Appointment

+

Add Condition

Delete Outcome

Add a screen element

Edit Screen

Components

Fields

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

* Record Variable

AppointmentRecordRes

Search Appointment fields

Fields (8)

Appointment Date/Time

Appointment No

Consultant

Appointment

Notes

Purpose/Topic

Status

EduConsultantPro Existing Student Flow

Appointment Date/Time

Purpose/Topic

Pause

Previous

Finish

Screen Properties

* Label

Appointment Booking Screen

* API Name

Appointment_Booking_Screen

Description


> Configure Header

> Configure Footer

Cancel

Done

Add a get record element

 Get Records

* Label

Get Consultant Rec

* API Name ⓘ

Get_Constantant_Rec

Description

Get Records of This Object

* Object

Consultant

Filter Consultant Records

Condition Requirements

All Conditions Are Met (AND) ▼

Field

Name

Operator

Equals ▼

Value

AppointmentRecordRes > Co...

×

+ Add Condition

Sort Consultant Records

Sort Order

Not Sorted ▼

⚠ If you store only the first record, filter by a unique field, such as ID.

How Many Records to Store

☒ Only the first record

☐ All records

How to Store Record Data

☒ Automatically store all fields

Create Appointment Record using Create Records Element

Create Records

* Label

Create Appointment

* API Name

Create_Appointment

Description

* How to set record field values

Manually

Create a Record of This Object

* Object

Appointment

Set Field Values for the Appointment

Field	Appointment_DateTime__c	Value	AppointmentRecordRes > Appointment Date/...
Field	Consultant__c	Value	Consultant from Get_Consultant_Rec > Record...
Field	Notes__c	Value	AppointmentRecordRes > Notes
Field	PurposeTopic__c	Value	AppointmentRecordRes > Purpose/Topic
Field	Student__c	Value	Student from Get_Rec > Record ID

+ Add Field

Add screen element

Edit Screen

Components

Fields

Search components...

Input (53)

Action Button (Beta)

Add Attendees

Address

Call Script

Cancel Appointment

Checkbox

Get more on the AppExchange

EduConsultantPro Existing Student Flow

Display Text

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

Pause

Previous

Finish

Display Text

* API Name

Appointment_Confirmation


Insert a resource...

Consultant Name :
Date &
Time :
Notes :


Cancel

Done

Add a Sub flow element


 Create a Case ×


* Label

* API Name 


Description

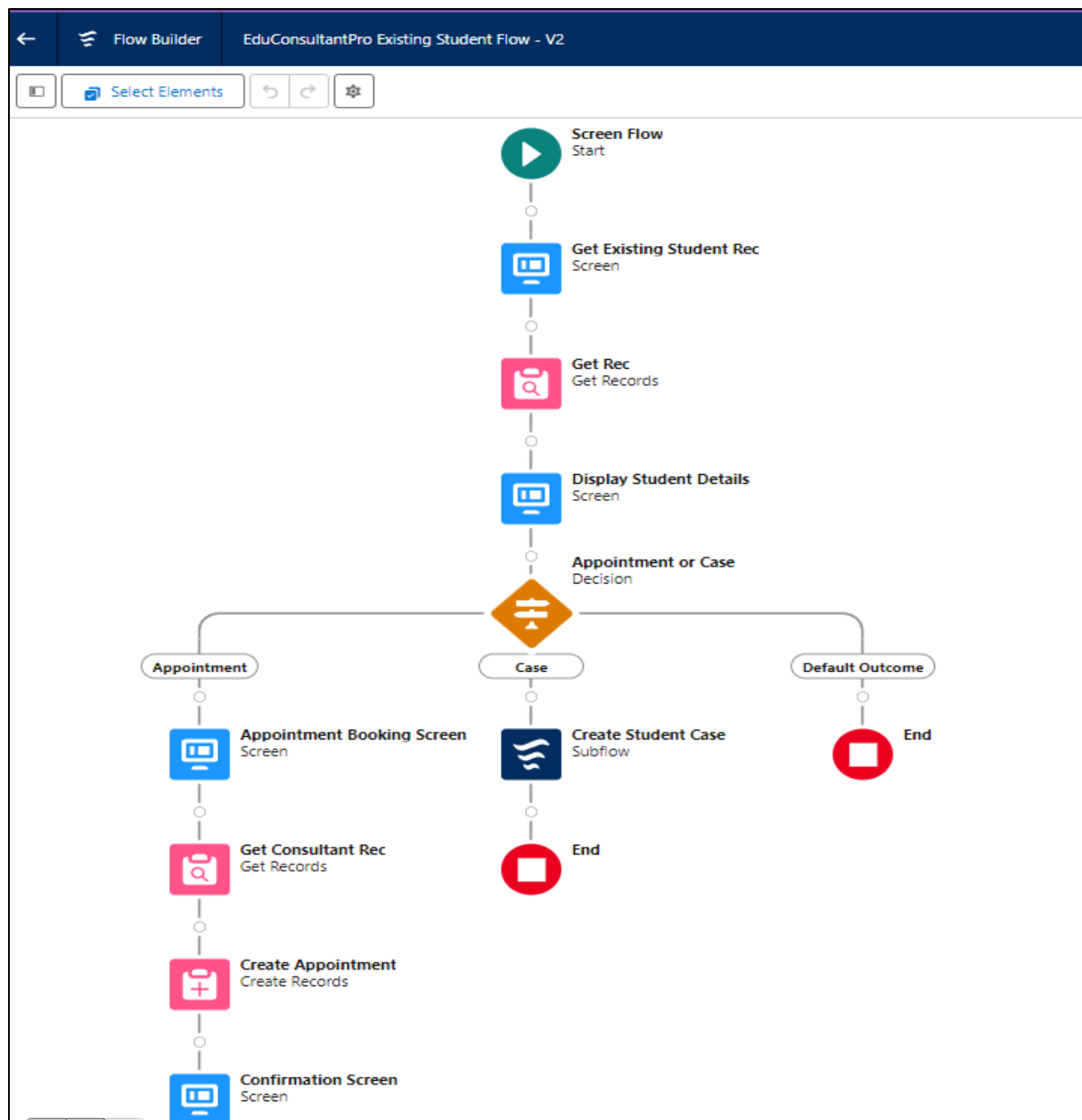
Referenced Flow

 **Create a Case**
setup_service_experience__Create_Case



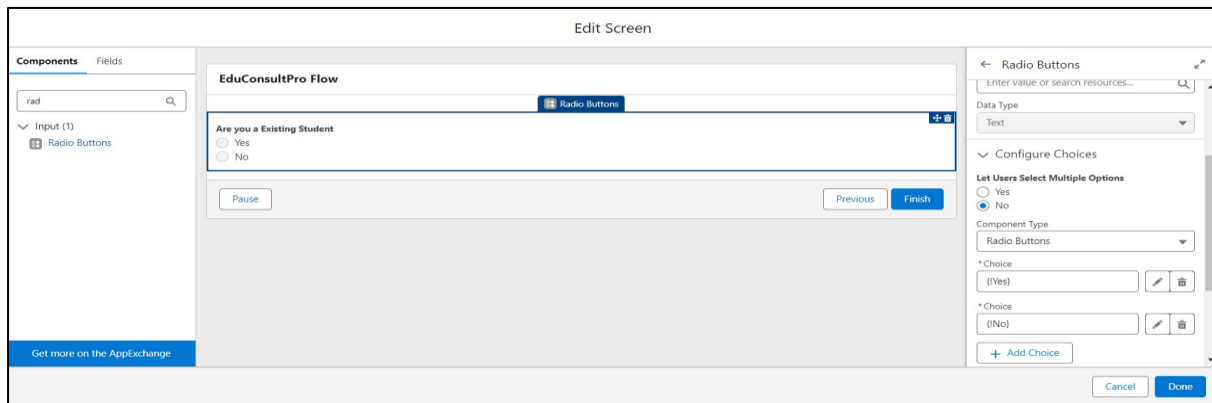
Use values from the parent flow to set the inputs for the "Create a Case" flow. By default, the parent flow stores all outputs. You can either reference outputs via the API name of the Subflow element or manually assign variables in the parent flow to store individual outputs from the "Create a Case" flow.





Milestone 7:- Create a ScreenFlow to Combine all the flows at one place

Add Screen Element



Add a decision element

Decision

✕

* Label

Decision 1

* API Name ⓘ

Decision_1

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

⋮ If Existing Student

* Label

If Existing Student

* Outcome API Name ⓘ

If_Existing_Student

⋮ If Not Existing user

Condition Requirements to Execute Outcome

All Conditions Are Met (AND) ▼

Default Outcome


Resource

Operator


Value

+ Add Condition

Add a subflow element


 EduConsultantPro Existing Student Flow


* Label

* API Name 

Description

Referenced Flow

 **EduConsultantPro Existing Student Flow**
EduConsultantPro_Existing_Student_Flow



Add a Subflow element



EduConsultantPro Student Flow

* Label

New Student Flow

* API Name 

New_Student_Flow

Description

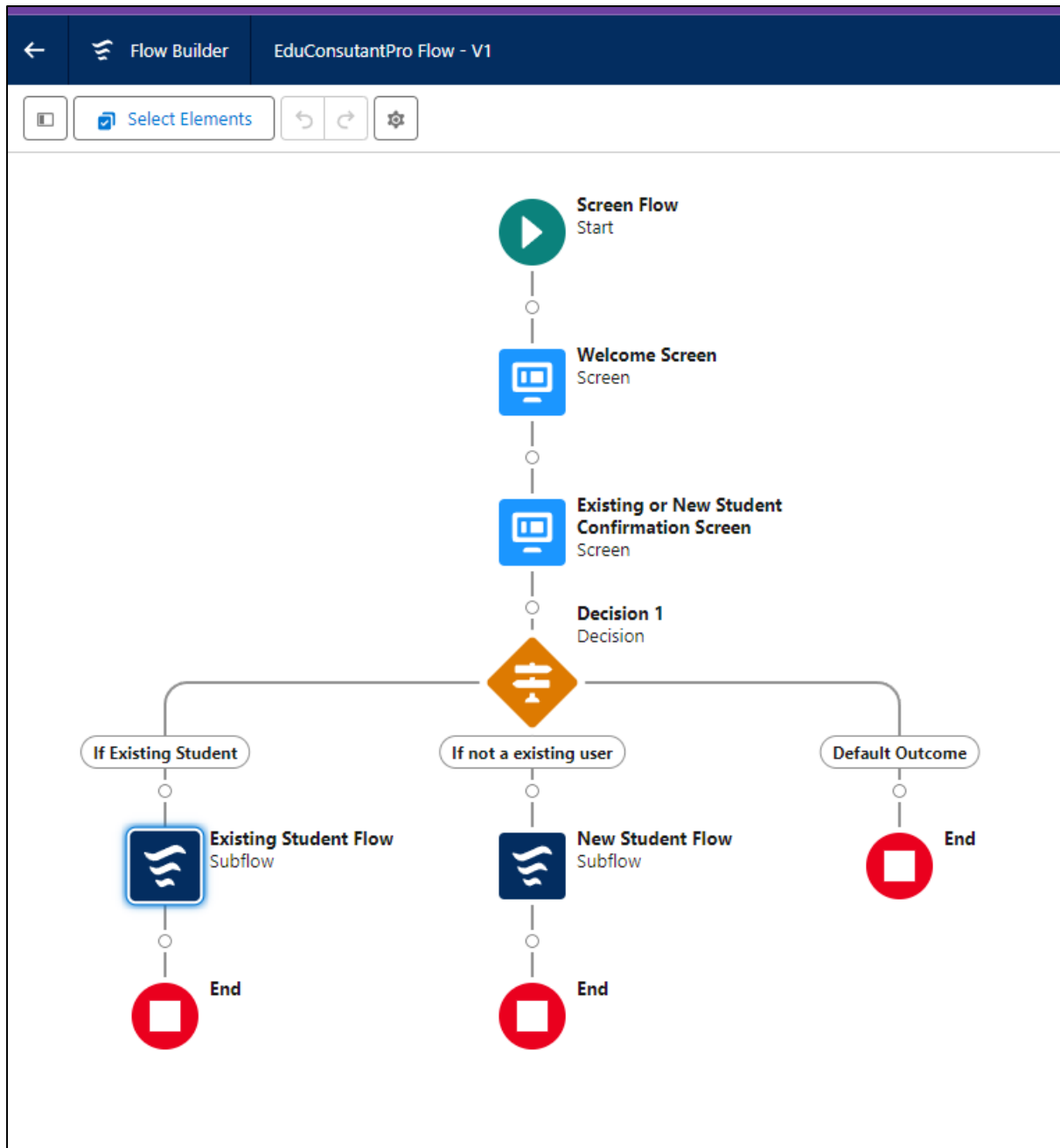
Referenced Flow



EduConsultantPro Student Flow

EduConsultantPro_Student_Flow





Milestone 8:- Create a lightning app page

Create a lightning app page and make it available at the application

Create a lightning app page

