Project Name:

A CRM Application to Manage the Services offered by an Institution

By

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Abstract:

EduConsultPro Institute is a top educational institution offering a variety of courses. As more students apply each year, it’s becoming harder to manage admissions, answer questions, and provide expert guidance. To make this process smoother, EduConsultPro plans to use Salesforce CRM, a powerful tool that helps organizations manage relationships and processes.

With Salesforce CRM, the admission process will be easier and more transparent for students. They can quickly ask questions, apply for courses, and track their application status online. Admissions staff will also find it easier to review applications, respond to student inquiries, and manage their work efficiently.

Overall, using Salesforce CRM will help EduConsultPro make the admission process faster and more organized, benefiting both students and staff.

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Topic 1: Create Objects from Spreadsheet

Create Course object:

Step 1: Access Object Manager

1. Log in to Salesforce.
2. Navigate to Setup by clicking the gear icon in the upper right corner.
3. In the Quick Find box, type "Object Manager" and click on Object Manager.

Step 2: Start Creating a New Object

1. In the Object Manager, click on Create and select Custom Object.
2. Alternatively, you can select Create Object from Spreadsheet.

Step 3: Get the Spreadsheet Template

1. Click the provided link to download the Course spreadsheet template. Ensure the file is downloaded correctly.

Step 4: Upload the Spreadsheet

1. In the Create Object from Spreadsheet option, click on Upload File and select the downloaded Course spreadsheet from your device.

Step 5: Map the Fields

1. After uploading, Salesforce will automatically detect the fields from the spreadsheet. Review these fields to ensure they match your intended object structure.
2. Map each field in the spreadsheet to the appropriate Salesforce data type.
3. For example:
    - Course Name (Text)
    - Course Code (Text)
    - Course Description (Long Text Area)
    - Duration (Number)
    - Start Date (Date)
    - End Date (Date)
4. Adjust any field mappings if necessary.

Step 6: Create the Object

1. Once all fields are correctly mapped, click on Next to proceed.
2. Review the object summary and confirm that all details are correct.
3. Click Finish to create the Course object in Salesforce.

Step 7: Verify the New Object

1. Go back to the Object Manager and search for the newly created Course object.
2. Review the object to ensure all fields and settings are correctly configured

Create Remaining objects:

Step 1: Access Object Manager

1. Log in to Salesforce.
2. Navigate to **Setup** by clicking the gear icon in the upper right corner.
3. In the Quick Find box, type "Object Manager" and click on **Object Manager**.

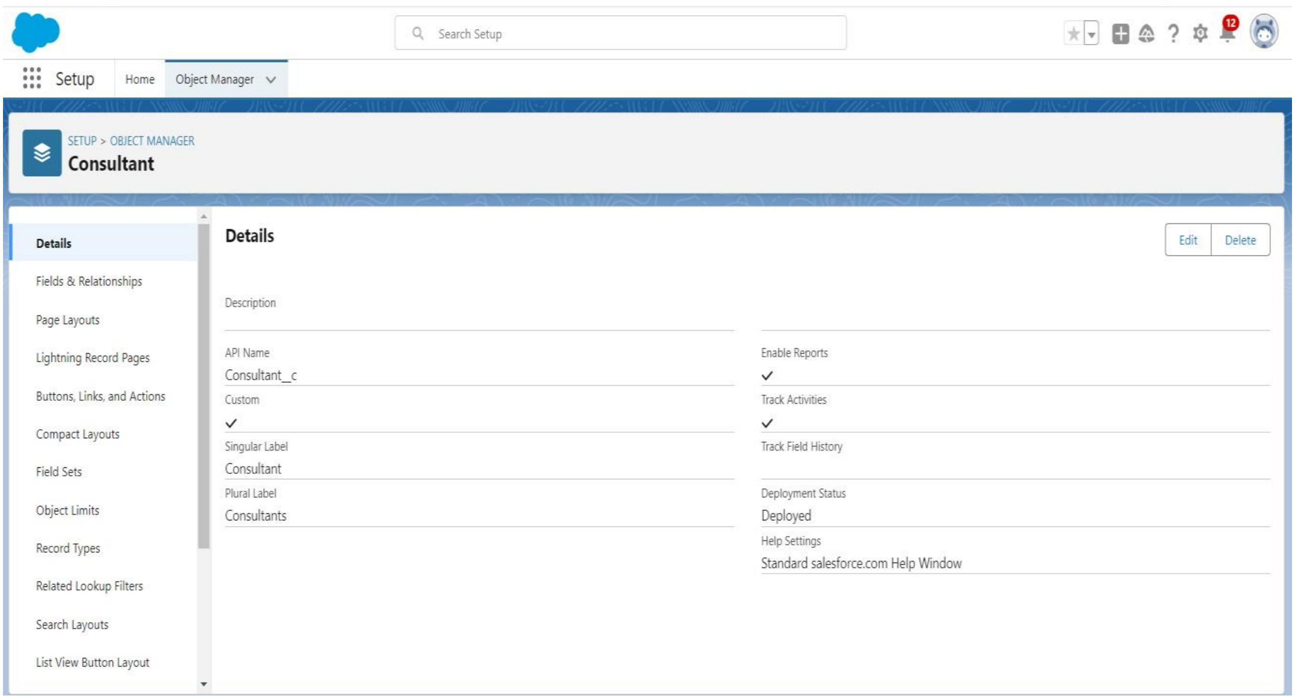
Step 2: Start Creating New Objects

1. In the Object Manager, click on **Create** and select **Custom Object**.
2. Alternatively, select **Create Object from Spreadsheet**.

Step 3: Upload Each Spreadsheet

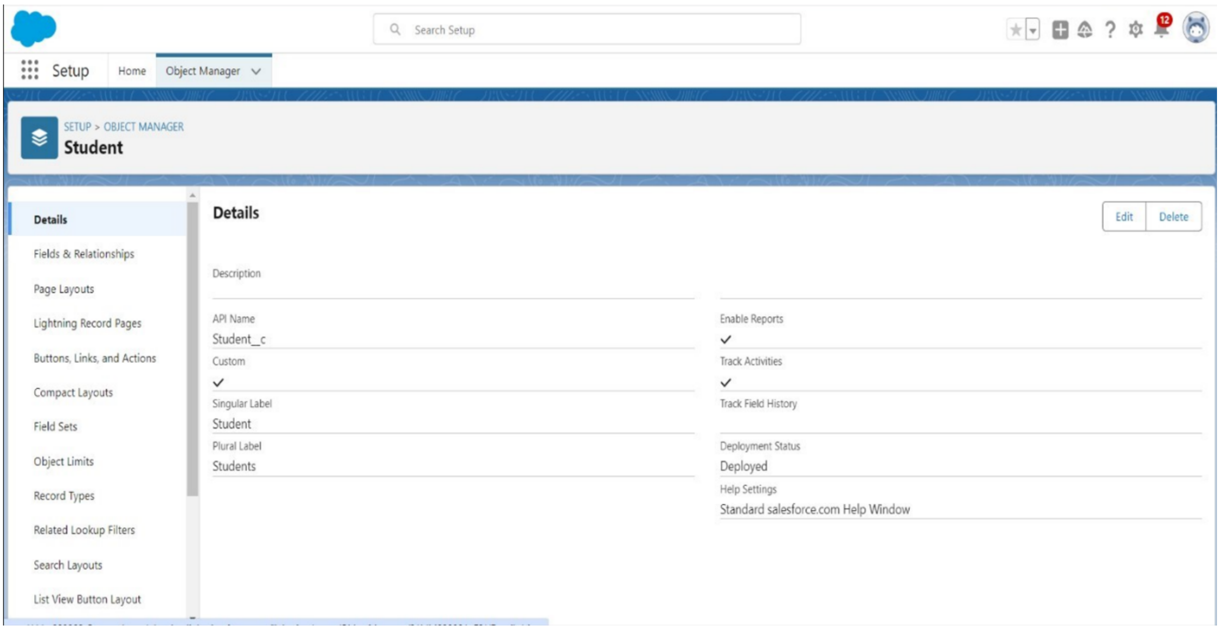
Consultant Object

1. **Get the Spreadsheet:** Download the **Consultant** spreadsheet.
2. **Upload the File:** Click on **Upload File** and select the **Consultant** spreadsheet from your device.
3. **Map the Fields:**
    - **Consultant Name** (Text)
    - **Consultant ID** (Text)
    - **Specialization** (Picklist)
    - **Experience** (Number)
    - **Availability** (Checkbox)
4. **Create the Object:** Once fields are mapped, click **Next**, review, and then click **Finish**.



Student Object

1. **Get the Spreadsheet:** Download the **Student** spreadsheet.
2. **Upload the File:** Click on **Upload File** and select the **Student** spreadsheet.
3. **Map the Fields:**
   - **Student Name** (Text)
   - **Student ID** (Text)
   - **Email** (Email)
   - **Phone Number** (Phone)
   - **Enrolled Course** (Lookup or Picklist)
   - **Enrollment Date** (Date)
4. **Create the Object:** Map the fields, click **Next**, review, and click **Finish**.

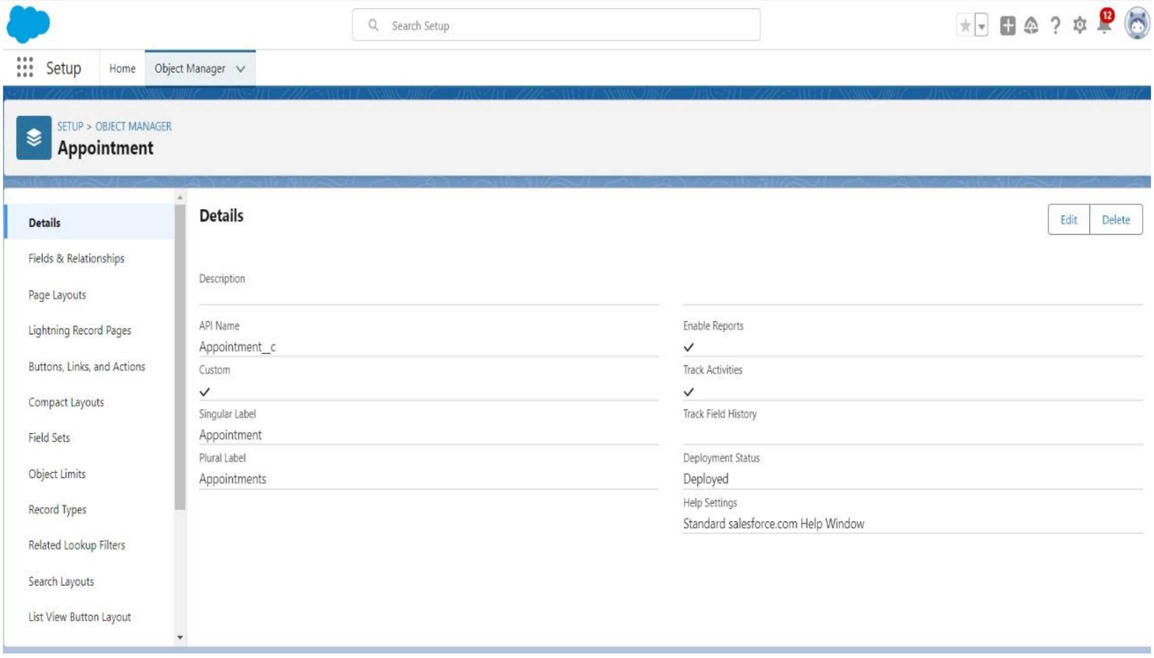


Appointment Object

1. **Get the Spreadsheet:** Download the **Appointment** spreadsheet.
2. **Upload the File:** Click on **Upload File** and select the **Appointment** spreadsheet.
3. **Map the Fields:**
   - **Appointment ID** (Auto Number or Text)
   - **Student** (Lookup to Student)
   - **Consultant** (Lookup to Consultant)
   - **Appointment Date** (Date/Time)
   - **Purpose** (Text Area)
   - **Status** (Picklist: Scheduled, Completed, Canceled)
4. **Create the Object:** Map the fields, click **Next**, review, and click **Finish**.

Step 4: Verify Each Object

1. After each object creation, return to **Object Manager**.
2. Search for the newly created **Consultant**, **Student**, and **Appointment** objects.
3. Review each object to ensure all fields and settings are correctly configured.



Create Relationship among the objects:

Step 1: Create Lookup Relationships

1. Lookup Between Appointment and Student

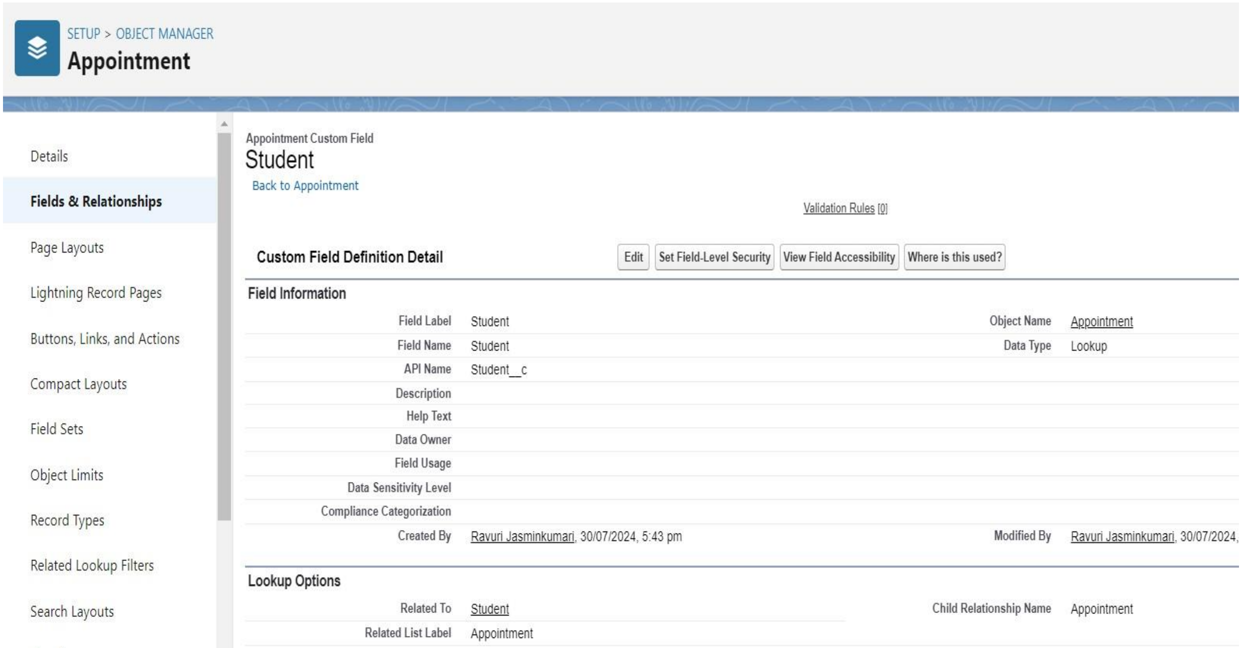
1. Navigate to Object Manager:

- Go to **Setup** and then **Object Manager**.
- Search for the **Appointment** object and click on it.

2. Create a Lookup Relationship:

- In the Appointment object, click on **Fields & Relationships**.
- Click **New** to create a new field.

- Select **Lookup Relationship** and click **Next**.
- Choose **Student** as the related object.
- Name the field **Student** and configure the options as needed.
- Click **Next**, set the field-level security, and add the field to the appropriate page layouts.
- Save the new lookup field



2. Lookup Between Appointment and Consultant

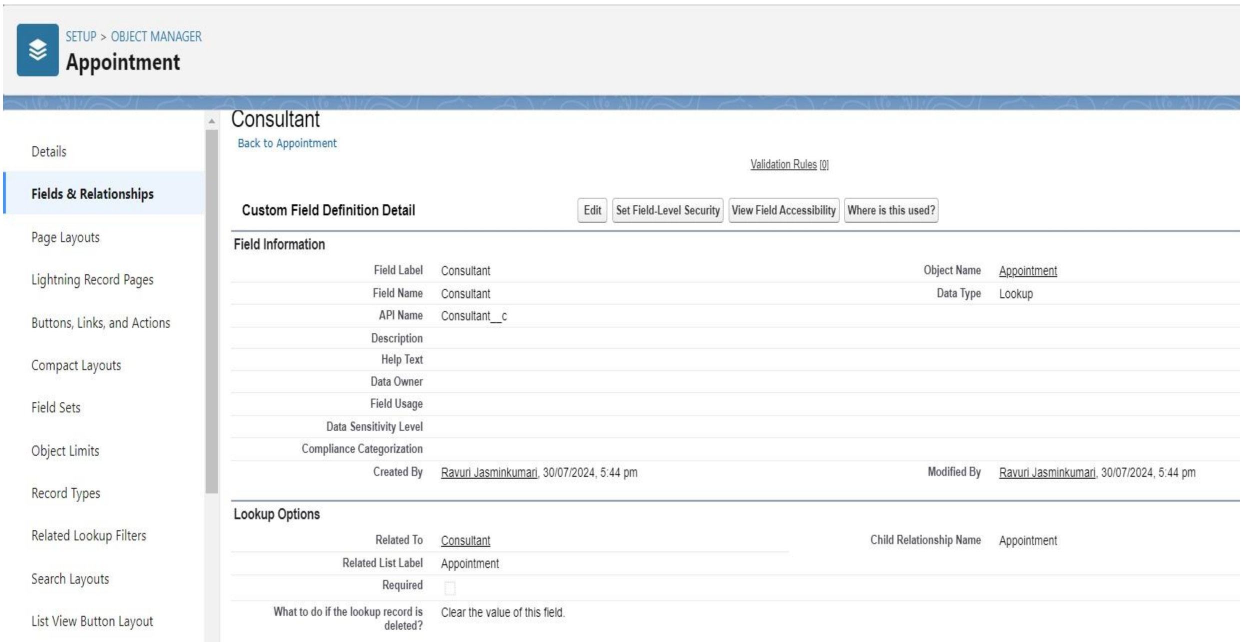
1. Navigate to Object Manager:

- Go to **Object Manager**.
- Search for the **Appointment** object and click on it.

2. Create a Lookup Relationship:

- In the Appointment object, click on **Fields & Relationships**.
- Click **New** to create a new field.

- Select **Lookup Relationship** and click **Next**.
- Choose **Consultant** as the related object.
- Name the field **Consultant** and configure the options as needed.
- Click **Next**, set the field-level security, and add the field to the appropriate page layouts.
- Save the new lookup field



Step 2: Create the Registration Object

1. Create the Registration Object

1. Navigate to Object Manager:

- Go to **Object Manager**.
- Click on **Create** and select **Custom Object**.

2.Define the Object:

- Name the object **Registration**.
- Provide a description if necessary.

- Configure settings like **Record Name** (e.g., Registration Number) and any optional features you need.
- Save the object.

2. Add Fields to the Registration Object

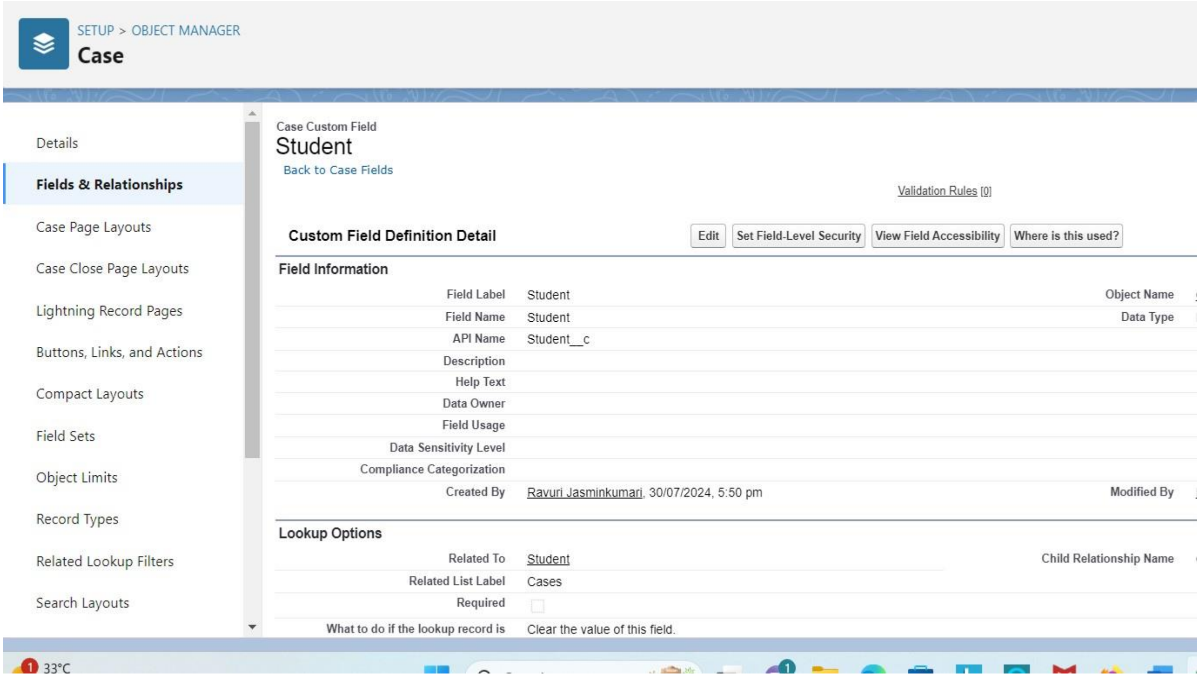
1. **Add Required Fields:**
   - Click on **Fields & Relationships** in the Registration object.
   - Add fields like **Registration Date** (Date), **Course** (Lookup to Course), **Student** (Lookup to Student).
   - Ensure the fields are correctly configured and added to page layouts.

Step 3: Create Lookup Between Student and Case

1. Lookup Between Student and Case

1. **Navigate to Object Manager:**
   - Go to **Object Manager**.
   - Search for the **Case** object and click on it.
2. **Create a Lookup Relationship:**
   - In the Case object, click on **Fields & Relationships**.
   - Click **New** to create a new field.
   - Select **Lookup Relationship** and click **Next**.
   - Choose **Student** as the related object.
   - Name the field **Student** and configure the options as needed.

- Click **Next**, set the field-level security, and add the field to the appropriate page layouts.
- Save the new lookup field.



Step 4: Review the Data Model

The relationships and objects you've created should result in a data model similar to this:

- **Student Object**:
  - Fields: Student Name, Student ID, Email, Phone Number, etc.
  - Relationships:
    - Lookup to **Course** via **Registration** (many-to-many through the Registration object).
    - Lookup to **Appointment**.
    - Lookup to **Case** (for managing student queries).

- **Consultant Object**:
  - Fields: Consultant Name, Consultant ID, Specialization, etc.
  - Relationships:
    - Lookup to **Appointment**.
- **Appointment Object**:
  - Fields: Appointment ID, Appointment Date, Purpose, Status, etc.
  - Relationships:
    - Lookup to **Student**.
    - Lookup to **Consultant**.
- **Course Object**:
  - Fields: Course Name, Course Code, Description, etc.
  - Relationships:
    - Lookup to **Registration**.
- **Registration Object**:
  - Fields: Registration Date, Course (Lookup), Student (Lookup).

This setup should enable you to manage student admissions, inquiries, course registrations, and appointments effectively within Salesforce.

Configure the Case Object:

Step 1: Access Object Manager

1. Log in to Salesforce.
2. Navigate to **Setup** by clicking the gear icon in the upper right corner.
3. In the Quick Find box, type "Object Manager" and click on **Object Manager**.
4. Search for and select the **Case** object.

Step 2: Edit the "Type" Field

1. In the Case object, go to **Fields & Relationships**.
2. Find and select the **Type** field from the list.
3. Scroll down to the **Values** section and click **New** to add new picklist values.
4. Enter the following values:
   - **Immigration**
   - **Visa Application**
5. After entering each value, click **Save**.

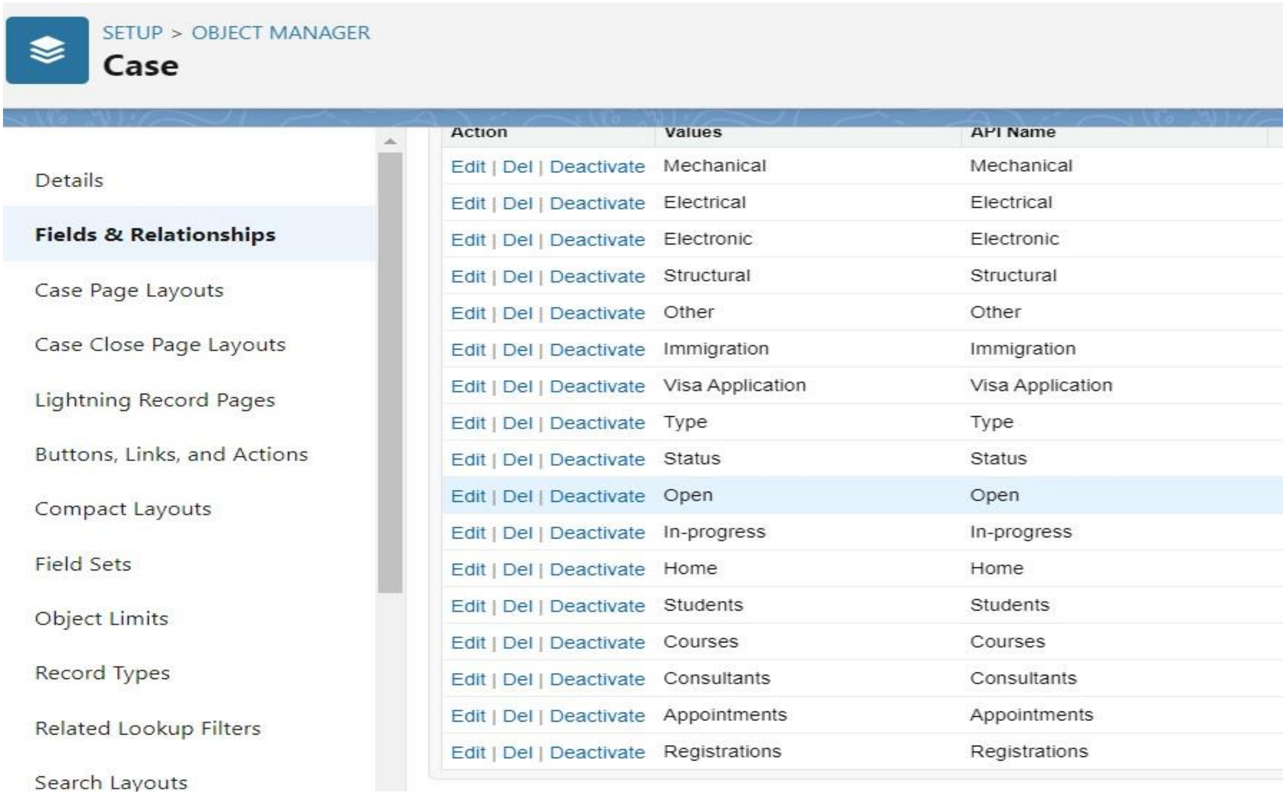
Step 3: Edit the "Status" Field

1. Still within the **Fields & Relationships** section, find and select the **Status** field.
2. Scroll down to the **Values** section and click **New** to add new picklist values.
3. Enter the following values:
   - **Open**
   - **In-progress**
4. After entering each value, click **Save**.

Step 4: Verify the Changes

1. Go back to the Case object and create a new record or edit an existing one to verify that the new "Type" and "Status" values are available for selection.

This will complete the configuration of the Case object with the new values in the "Type" and "Status" fields.



Create a Lightning App:

Step 1: Access App Manager

1. Log in to Salesforce.
2. Navigate to Setup by clicking the gear icon in the upper right corner.
3. In the Quick Find box, type "App Manager" and click on App Manager.

Step 2: Create a New Lightning App

1. In the App Manager, click on New Lightning App.
2. App Name: Enter "EduConsultPro" as the app name.
3. Click Next.

Step 3: Configure the App

1. Keep clicking Next through the different configuration options:
    - App Options: Customize branding or keep the default.
    - Navigation: Set navigation as Standard Navigation.

Step 4: Add Items to the App

1. On the Navigation Items screen, select the following from Available Items and add them to Selected Items:
    - Home
    - Students
    - Courses
    - Consultants
    - Appointments
    - Registrations
    - Cases
2. Click Next.

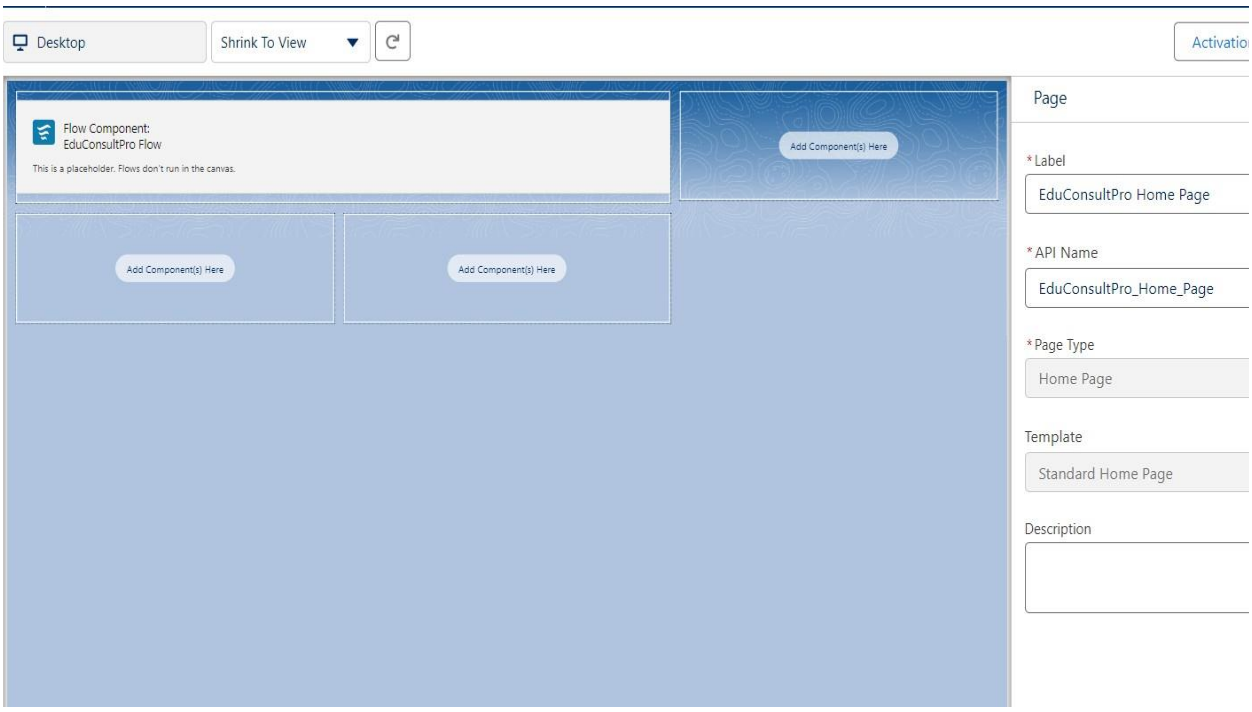
Step 5: Assign Profiles

1. On the Assign Profiles screen, select System Administrator from the Available Profiles and add it to Selected Profiles.
2. Click Save & Finish.

Step 6: Verify the App

1. Go to the App Launcher (grid icon in the upper left corner).
2. Search for and select the EduConsultPro app to verify that it has been created with the appropriate navigation items.

This will create the "EduConsultPro" Lightning App, complete with the necessary objects and access for the System Administrator profile.



Topic 2: Create a ScreenFlow for Student Admission Application process.

Step 1: Add a Screen Element

1. Access Flow Builder:
   - Log in to Salesforce.
   - Navigate to Setup and enter "Flow Builder" in the Quick Find box, then select Flow Builder.
   - Click on New Flow.
   - Choose Screen Flow and click Create.
2. Add a Screen Element:
   - In the Flow Builder, click on the + icon (Add Element).
   - Select Screen from the list of elements.
3. Configure the Screen Element:
   - In the Screen Properties pane, set the Label to "Student Info".
   - Click Fields on the left side of the screen.
   - Click on the Record Variable input box and select + New Resource**.**
   - Create a Variable named StudentRecordRes with a Data Type of Record and select Student as the Object.

- Click Done to create the variable.
- Drag and drop the fields from StudentRecordRes that you want to collect (e.g., Student Name, Email, Phone Number, Enrolled Course, Enrollment Date).
- Click Done to finish configuring the screen.

Step 2: Add a Create Element

1. Add the Create Element:
    - After the "Student Info" screen element, click the + icon to add another element.
    - Select Create Records from the list.
2. Configure the Create Element:
    - In the Create Records Properties pane, set the Label to "Create Student Record".
    - Under How Many Records to Create, select One.
    - Under How to Set the Record Fields, select Use all values from a record.
    - In the Create a Record From These Values section, select the StudentRecordRes variable you created in the previous step.
    - Click Done.

Step 3: Add the Course Screen Element

1. Add a Screen Element:
   - After the "Create Student Record" element, click on the + icon to add a new element.
   - Select Screen from the list.
2. Configure the Screen Element:
   - In the Screen Properties pane, set the Label to "Course Screen".
   - On the left side, drag the Picklist component onto the screen.
   - Set the Label to "Select Course".
   - Under Choices, type "IELTS" and press Enter to create a choice variable named IELTS.
   - Repeat the above step to create additional choices for "GRE", "GMAT", "Duolingo", and "TOEFL".
   - Click Done to save the screen.

Step 4: Add the Decision Element

1. Add a Decision Element:
   - After the "Course Screen" element, click on the + icon to add a new element.
   - Select Decision from the list.
2. Configure the Decision Element:

- In the Decision Properties pane, set the Label to "Selecting Course".
- Outcome 1 (Selected IELTS):
  - Label: "Selected IELTS"
  - Condition:
    - Resource: Select_Course (Picklist Component from Course Screen)
    - Operator: Equals
    - Value: IELTS (Choice Variable from Course Screen)
- Repeat the above steps for the following outcomes:
  - Selected GRE: Select_Course = GRE
  - Selected GMAT: Select_Course = GMAT
  - Selected Duolingo: Select_Course = Duolingo
  - Selected TOEFL: Select_Course = TOEFL
- Click Done to save the decision element.

Step 5: Add GET Record Elements

1. Add a GET Record Element for IELTS:
   - Under the Selected IELTS outcome path, click on the + icon to add a new element.
   - Select Get Records from the list.

2. Configure the GET Record Element:
   - In the Get Records Properties pane, set the Label to "Get IELTS Rec".
   - Select Course as the object.
   - Condition Requirements: All Conditions Are Met (AND)
   - Set the condition:
     - Field: Course Name
     - Operator: Equals
     - Value: {!Select_Course} (Picklist Value from Course Screen)
   - Click Done to save the element.
3. Repeat the Above Steps for each of the other course options:
   - Selected GRE: Add a GET Record element labeled "Get GRE Rec" with the same configuration.
   - Selected GMAT: Add a GET Record element labeled "Get GMAT Rec".
   - Selected Duolingo: Add a GET Record element labeled "Get Duolingo Rec".
   - Selected TOEFL: Add a GET Record element labeled "Get TOEFL Rec".

Step 6: Create Registration Records Using Create Records Element

1. Add a Create Record Element for IELTS:
   - Under the Get IELTS Rec element, click on the + icon to add a new element.
   - Select Create Records from the list.
2. Configure the Create Records Element:
   - In the Create Records Properties pane, set the Label to "Create IELTS Registration Rec".
   - How Many Records to Create: Select "One".
   - How to Set the Record Fields: Select "Use separate resources, and literal values".
   - Object: Select Registration.
   - Field Mapping:
     - Course_Name__c: Value = {!Get_IELTS_Rec.Id}
     - Student_Name__c: Value = {!StudentRecordRes.Id}
   - Click Done to save the element.
3. Repeat the Above Steps for each of the other course options:
   - Selected GRE: Add a Create Records element labeled "Create GRE Registration Rec".

- Selected GMAT: Add a Create Records element labeled "Create GMAT Registration Rec".
- Selected Duolingo: Add a Create Records element labeled "Create Duolingo Registration Rec".
- Selected TOEFL: Add a Create Records element labeled "Create TOEFL Registration Rec".

Step 7: Create Email Text Template Variables

1. **Create Email Body Text Template:**
    - In the Flow Builder, click on the **Toggle Toolbox** in the left corner.
    - Click **New Resource**.
    - Select **Text Template** as the Resource Type.
    - Set the API Name to **StuRegistrationEmailTextTempBody**.
    - Select **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 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**.

2. **Create Email Subject Text Template:**
  - Repeat the above steps to create another **Text Template** resource.
  - Set the API Name to **StuRegistrationEmailTextTempSub**.
  - Enter the desired subject text, for example:

Welcome to EduConsultantPro - Registration Confirmation

  - Click **Done**.

Step 8: Add an Action Element to Send Email

1. **Add an Action Element:**
  - After all the Decision paths (from the previous steps), click the **+** icon to add a new element.
  - Select **Action** from the list.
  - Label it as **Send Email to Student**.

2. **Configure the Action Element:**
   - Under **Set Input Values for Selected Action**, you'll need to map the following inputs:
     - **Body**: Select {!StuRegistrationEmailTextTempBody}.
     - **Recipient Address List**: Select {!StudentRecordRes.Email__c}.
     - **Subject**: Select {!StuRegistrationEmailTextTempSub}.
   - Click **Done** to save the action element.

Step 9: Add a Success Screen Element

1. **Add a Screen Element:**
   - After the "Send Email to Student" Action Element, click the **+** icon to add a new element.
   - Select **Screen** from the list.
   - Label it as **Success Screen**.
2. **Configure the Screen Element:**
   - From the left panel, drag the **Display Text** component into the main panel.
   - Label the component as **SuccessMessage**.
   - In the Resource picker box, paste the following text:

Dear {!StudentRecordRes.Name},

Congratulations and welcome to EduConsultantPro!

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

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

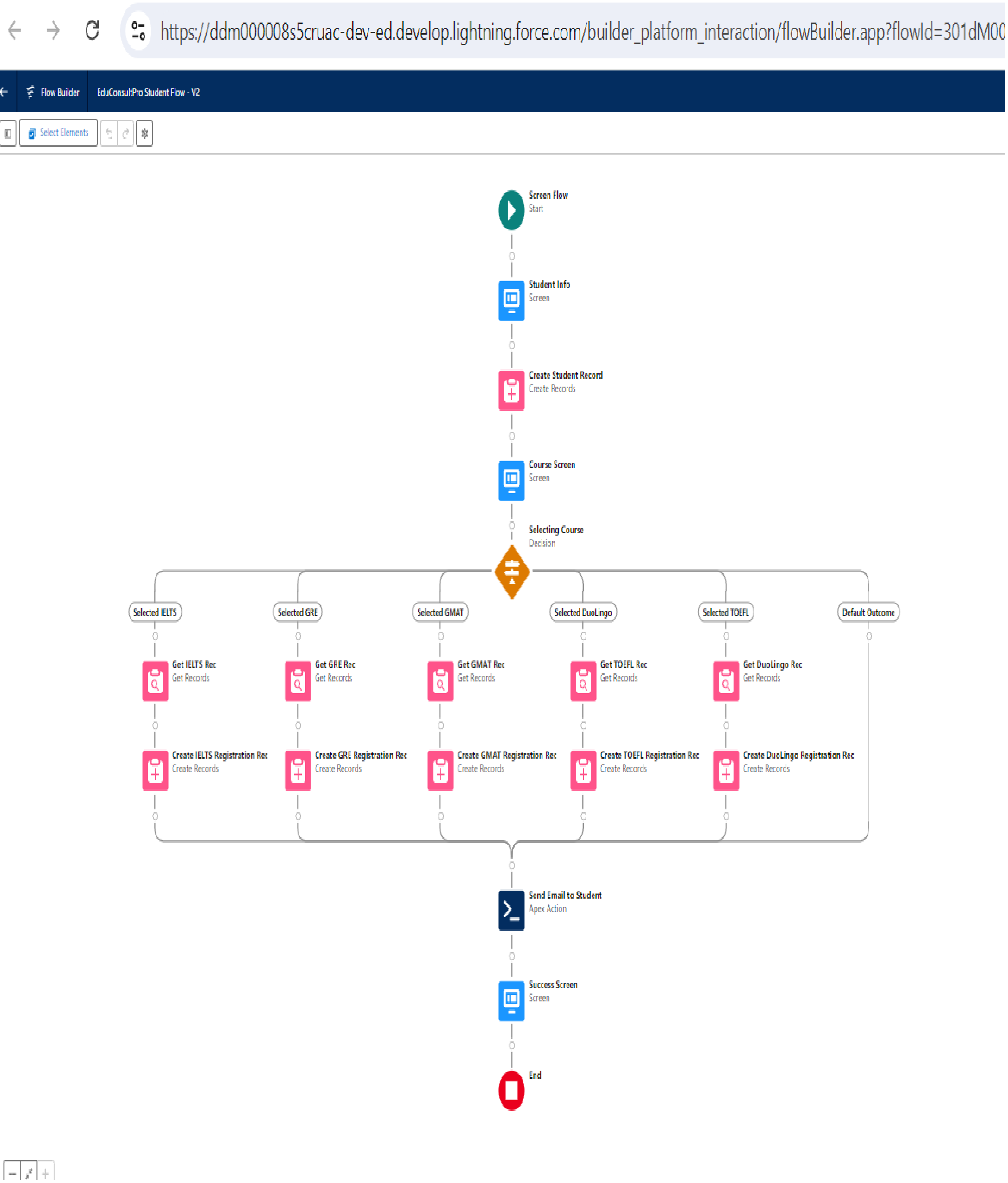
Thank you.

- Click **Done** to save the screen element.

Step 10: Save and Name the Flow

1. **Save the Flow:**
    - Click **Save**.
    - Enter the Flow Name as **EduConsultPro Student Flow**.
2. **Activate the Flow:**
    - Click **Activate** to make the flow available for use.

This completes the configuration of the flow, where it will send a confirmation email to the student and display a success message on the screen.


https://ddm000008s5cruac-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowBuilder.app?flowId=301dM00
Flow Builder
EduConsultPro Student Flow - V2
Select Elements
Screen Flow
Start
Student Info
Screen
Create Student Record
Create Records
Course Screen
Screen
Selecting Course
Decision
Selected IELTS
Selected GRE
Selected GMAT
Selected DuoLingo
Selected TOEFL
Default Outcome
Get IELTS Rec
Get Records
Get GRE Rec
Get Records
Get GMAT Rec
Get Records
Get TOEFL Rec
Get Records
Get DuoLingo Rec
Get Records
Create IELTS Registration Rec
Create Records
Create GRE Registration Rec
Create Records
Create GMAT Registration Rec
Create Records
Create TOEFL Registration Rec
Create Records
Create DuoLingo Registration Rec
Create Records
Send Email to Student
Apex Action
Success Screen
Screen
End

Topic 3: Create Users

Step 1. Create a New User

1. Navigate to Setup:
   - Click on the gear icon in the top right corner of Salesforce.
   - Select Setup from the dropdown.
2. Go to Users:
   - In the Quick Find box, type Users and select Users under Administration.
3. Create a New User:
   - Click on New User.
4. Fill in the Details:
   - Last Name: Consultant
   - Alias: [Auto-populated]
   - Email: Enter a valid email address.
   - Username: Enter a unique username (it must be in the format of an email address, e.g., consultant@domain.com).
   - Nickname: [Auto-populated]
   - Role: (optional)
   - User License: Salesforce Platform
   - Profile: Standard Platform User

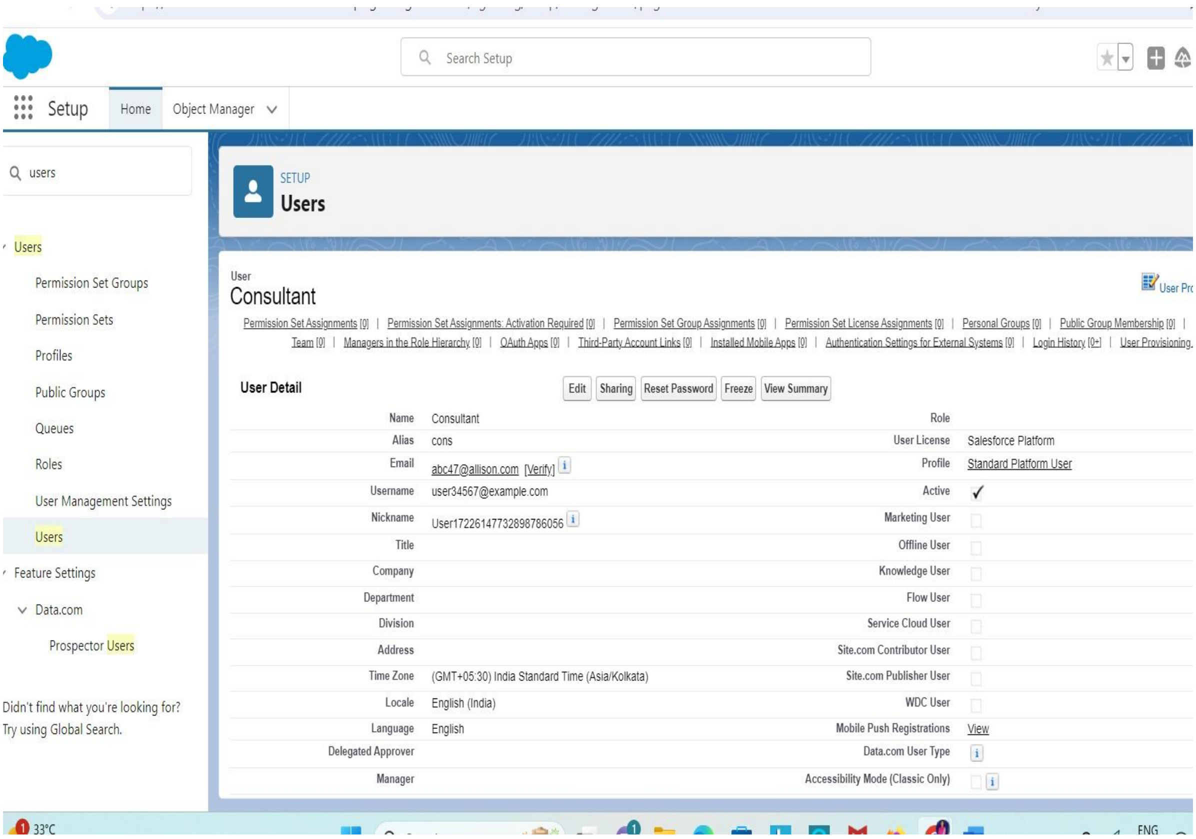
    - Time Zone, Locale, Language: Select as per your requirement.
    - Email Encoding: Select as per your requirement.
    - Currency: Select the appropriate currency.
    - Receive Salesforce CRM Content Emails: (optional)
5. Click Save to create the user.

Step 2. Configure the User Settings

1. Navigate to User Settings:
    - Go back to Users under Administration in Setup.
2. Edit the User:
    - Locate your username and click Edit next to it.
3. Approver Settings:
    - Scroll down to the bottom of the page.
    - Under Approver Settings, in the Manager field, select "Consultant".
4. Click Save to apply the changes.

This completes the process of creating a new user and configuring the user settings in Salesforce.


Language
English
Approver Settings
Delegated Approver
Manager
Consultant
Receive Approval Request Emails
Only if I am an approver
Generate new password and notify user immediately
Save
Save & New
Cancel


Search Setup
Setup
Home
Object Manager
users
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Feature Settings
Data.com
Prospector Users
Didn't find what you're looking for?
Try using Global Search.
SETUP
Users
User
Consultant
User Detail
Edit
Sharing
Reset Password
Freeze
View Summary
Name Consultant
Alias cons
Email abc47@allison.com [Verify]
Username user34567@example.com
Nickname User17226147732898786056
Title
Company
Department
Division
Address
Time Zone (GMT+05:30) India Standard Time (Asia/Kolkata)
Locale English (India)
Language English
Delegated Approver
Manager
Role
User License Salesforce Platform
Profile Standard Platform User
Active
Marketing User
Offline User
Knowledge User
Flow User
Service Cloud User
Site.com Contributor User
Site.com Publisher User
WDC User
Mobile Push Registrations View
Data.com User Type
Accessibility Mode (Classic Only)

Topic 4: Create an Approval Process for Property Object

1. Enable Lightning Email Templates

1. From Setup, enter "Templates" in the Quick Find box.
2. Select "Lightning Email Templates" and toggle it on.

2. Create a New Folder for Email Templates

1. Go to the App Launcher and search for "Email Templates".
2. Click on "Email Templates" and create a new folder with your desired name.

3. Create the Submission Email Template

1. Navigate to the Folder:
   - Select the folder you created.
2. Create a New Email Template:
   - Enter the following HTML content for the 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.

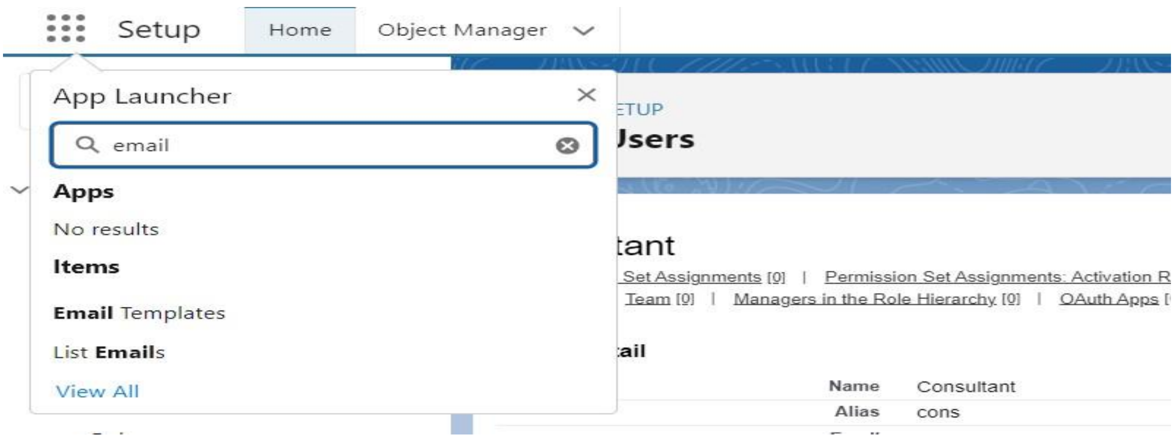
Best regards,

{{{Recipient.Name}}},

EduConsultantPro

- Save this template as "Submission Template".

3. Create Two More Email Templates**:**
    - Approval Template: Customize the content to acknowledge the approval of the appointment.
    - Rejection Template: Customize the content to notify about the rejection of the appointment request.



4. Configure the Approval Process

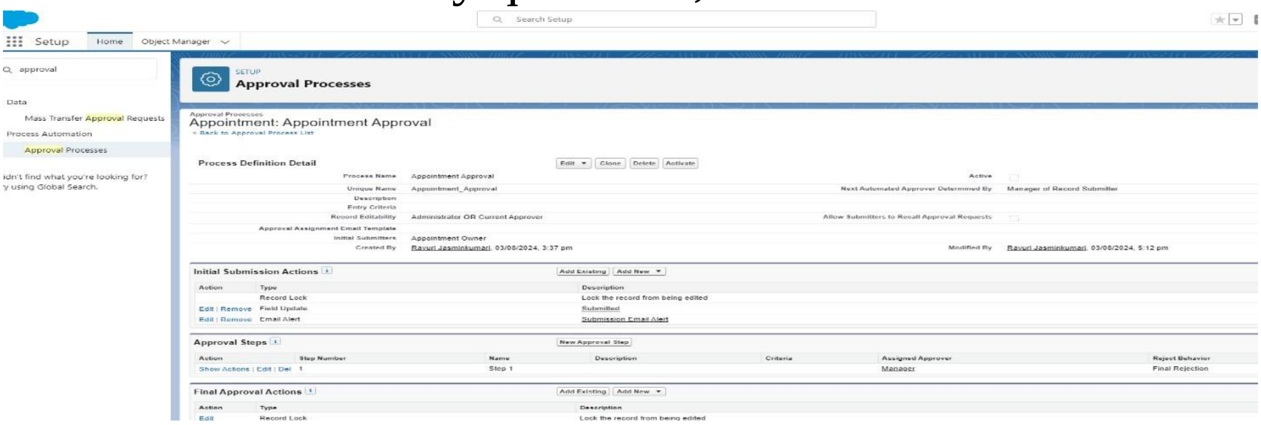
1. Create New Approval Process:
    - From Setup, enter "Approval" in the Quick Find box.
    - Select "Approval Processes".
    - In "Manage Approval Processes For", select "Appointment".
    - Click "Create New Approval Process" and choose "Use Jump Start Wizard".
2. Configure the Approval Process:
    - Process Name: Appointment Approval
    - Approver: Under "Select Approver", choose "Manager" for the option "Automatically assign an approver using a standard or custom hierarchy field."
3. Configure Record Editability Properties:
    - Record Editability: Click on "Administrators OR the currently assigned approver" to allow them to edit records during the approval process.
4. Initial Submission Actions:
    - Field Update:
        - Name: Submitted

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

- Email Alert:
  - Description: Submission Email Alert
  - Email Template: Submission Template
  - Recipient Type: Select your name

5. Final Approval and Final Rejection Actions:
   - Repeat the above steps for adding field updates and email alerts for final approval and final rejection actions.
6. Save the Approval Process:
   - Click "Save" to finalize the approval process.
7. View Approval Process Detail Page:
   - Click "View Approval Process Detail Page" to review the configuration.

This guide should help you set up your email templates and approval process effectively. If you need further assistance or have any questions, feel free to ask!



Topic 5: Create a Record Triggered Flow

1. Configure the Start Element

1. Navigate to Flows:

- From Setup, enter "Flows" in the Quick Find box.
- Select "Flows".

2. Create a New Flow:

- Click "New Flow".

3. Select Flow Type:

- Choose "Record-Triggered Flow".
- Click "Create".

4. Configure the Start Element:

- The "Configure Start" window opens.
- **Object:** Select Appointment.
- **Trigger the Flow When:** Select "A record is created".
- Click "Done" to complete the configuration of the Start Element.

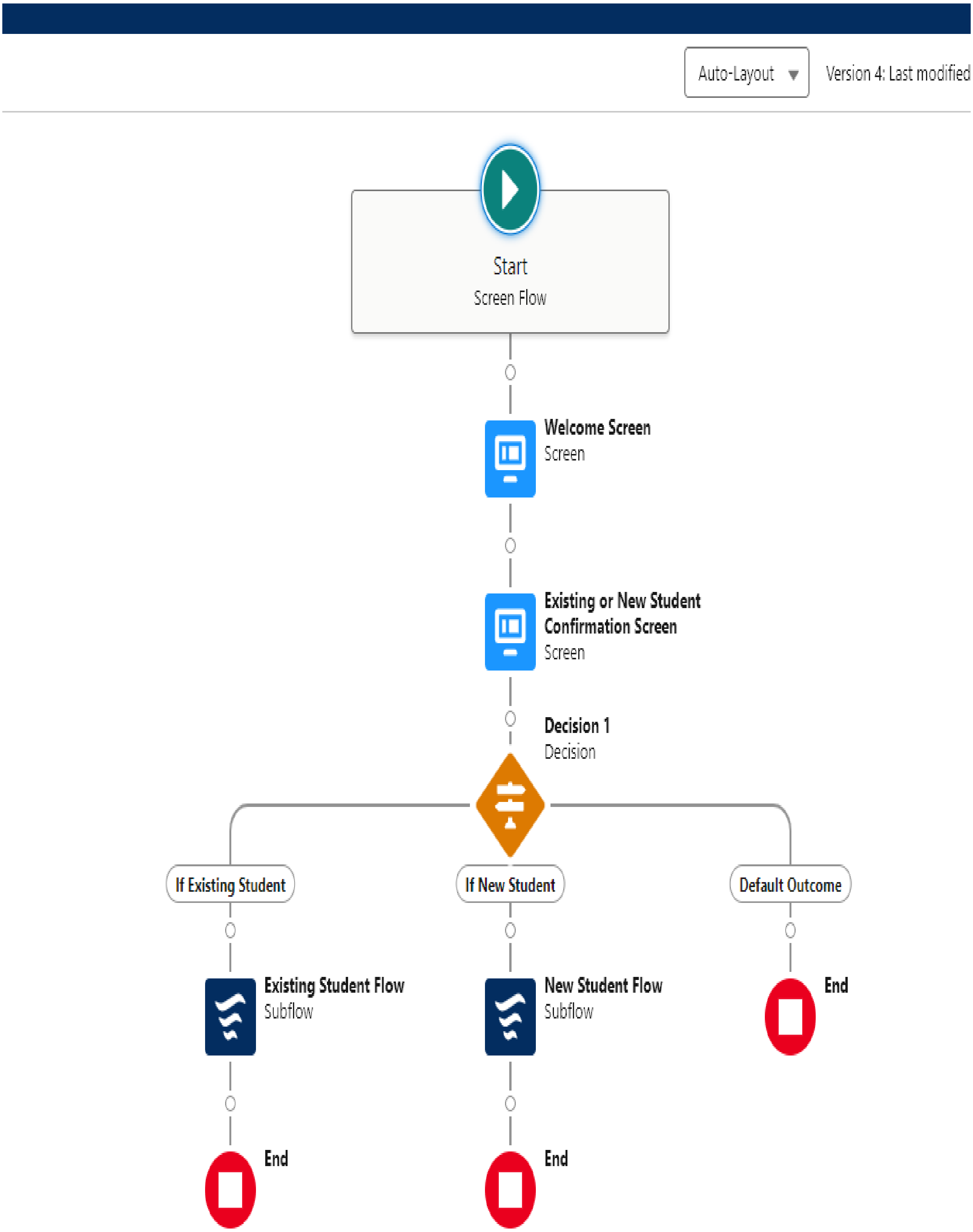
2. Add an Action Element

1. Add an Action Element:

- Click the "+" button to add an element to the flow.

    - Select "Action" from the list of element types.
2. **Configure the Action:**
    - **Action Type:** Choose "Submit for Approval".
    - **Label:** Enter "Approval SubFlow".
    - **RecordId:** Set to {!$Record.Id}.
3. **Save and Activate the Flow:**
    - Click "Save" to save the flow.
    - **Flow Name:** Label it as "EduConsultPro Approval Flow".
    - Click "Activate" to make the flow live.

This configuration will trigger the flow when an Appointment record is created, and it will automatically submit the record for approval. If you need further customization or run into any issues, just let me know!


Auto-Layout
Version 4: Last modified
Start
Screen Flow
Welcome Screen
Screen
Existing or New Student Confirmation Screen
Screen
Decision 1
Decision
If Existing Student
If New Student
Default Outcome
Existing Student Flow
Subflow
New Student Flow
Subflow
End
End
End

Topic 5: Create a ScreenFlow for Existing Student to Book an Appointment

1. Create a New Screen Flow

1. Navigate to Flow Builder:
   - From Setup, enter "Flow Builder" in the Quick Find box.
   - Select "New Flow".
2. Choose Flow Type:
   - Select "Screen Flow".
   - Click "Create".

2. Add a Screen Element

1. Add a Screen Element:
   - Drag and drop the "Screen" element from the left side panel onto the canvas.
2. Configure Screen Properties:
   - Label: Enter "Get Student Info".
3. Add Text Components:
   - Drag and drop two "Text" components onto the screen.
   - First Text Component:
     - Label: Enter Student Name
     - API Name: Enter_Student_Name

  - Second Text Component:
    - Label: Enter Student Email
    - API Name: Enter_Student_Email
4. Click "Done" to save the screen configuration.

3. Add a GET Record Element

1. Add GET Record Element:
   - Drag and drop the "Get Records" element onto the canvas, placing it after the Decision element in the "get student info" path.
2. Configure GET Record Element:
   - Label: Enter "Get Rec".
   - Object: Select Student.
   - Condition Requirement: Choose "All Conditions Are Met (AND)".
3. Set Filter Conditions:
   - Field: Student Name
     - Operator: Equals
     - Value: {!Enter_Student_Name}
   - Field: Email__c
     - Operator: Equals
     - Value: {!Enter_Student_Email}

4. **Click "Done"** to save the GET Record configuration.

4. Add a Decision Element

1. Add Decision Element:
   - Drag and drop the "Decision" element onto the canvas, after the "Select Display Student Details" element.
   - Label: Enter "Appointment or Case".
2. Configure Decision Outcome for Appointment:
   - Outcome Label: Enter "Appointment".
   - Condition:
     - Resource: {!How_may_I_Help_you}
     - Operator: Equals
     - Value: {!Book_an_Appointment}
3. Add Another Outcome for Case:
   - Click on the "+" icon to add another outcome.
   - Configure the condition similarly for the Case option, depending on how you want to distinguish between Appointment and Case paths.

Add an Appointment Booking Screen

5. Add a Screen Element:

- Drag and drop a "Screen" element onto the canvas, after the Decision Element, on the Appointment path.
- Label: Enter "Appointment Booking Screen".

2. Configure Screen Fields:
    - Click on "Fields".
    - Record Variable Input: Create a new Resource named AppointmentRecordRes to display all the fields related to the Appointment object.
    - Drag the fields required to collect student information (e.g., Appointment DateTime, Consultant Name, PurposeTopic, etc.) into the screen.
    - Click "Done" to save the screen configuration.

6. Add a GET Record Element

1. Add GET Record Element:
    - Drag and drop a "Get Records" element onto the canvas, after the Decision Element, under the Appointment path.
    - Label: Enter "Get Consultant Rec".
    - Object: Select Consultant.
    - Condition Requirement: Choose "All Conditions Are Met (AND)".
2. Set Filter Conditions:

- Field: Name
- Operator: Equals
- Value: {!AppointmentRecordRes.Consultant_Name_c}
- Click "Done" to save the GET Record configuration.

7. Create Appointment Record

1. Add a Create Records Element:
    - Drag and drop the "Create Records" element onto the canvas, after the "Get Consultant Rec" element.
    - Label: Enter "Create Appointment".
    - How Many Records to Create: Select "One".
    - How to Set the Record Fields: Select "Use separate resources, and literal values".
2. Configure Fields:
    - Object: Select Appointment.
    - Field: Appointment_DateTime__c
        - Value: {!AppointmentRecordRes.Appointment_DateTime__c}
    - Field: Consultant__c

        - Value: {!Get_Consultant_Rec.Id}
    - Field: Notes__c
        - Value: {!AppointmentRecordRes.Notes__c}
    - Field: PurposeTopic__c
        - Value: {!AppointmentRecordRes.PurposeTopic__c}
    - Field: Student_Name__c
        - Value: {!Get_Rec.Id}
    - Click "Done" to save the configuration.

8. Add a Confirmation Screen

1. Add a Screen Element:
    - Drag and drop a "Screen" element onto the canvas, after the "Send Email to Student" action element.
    - Label: Enter "Confirmation Screen".
2. Configure Display Text Component:
    - From the left side panel, search for the "Display Text" component and drag it onto the screen.
    - Label: Enter "Appointment_Confirmation".

Content:

Consultant Name : {!Get_Consultant_Rec.Name},

Date & Time : {!AppointmentRecordRes.Appointment_DateTime__c},

Notes : {!AppointmentRecordRes.Notes__c},

- Click "Done" to save the screen configuration.

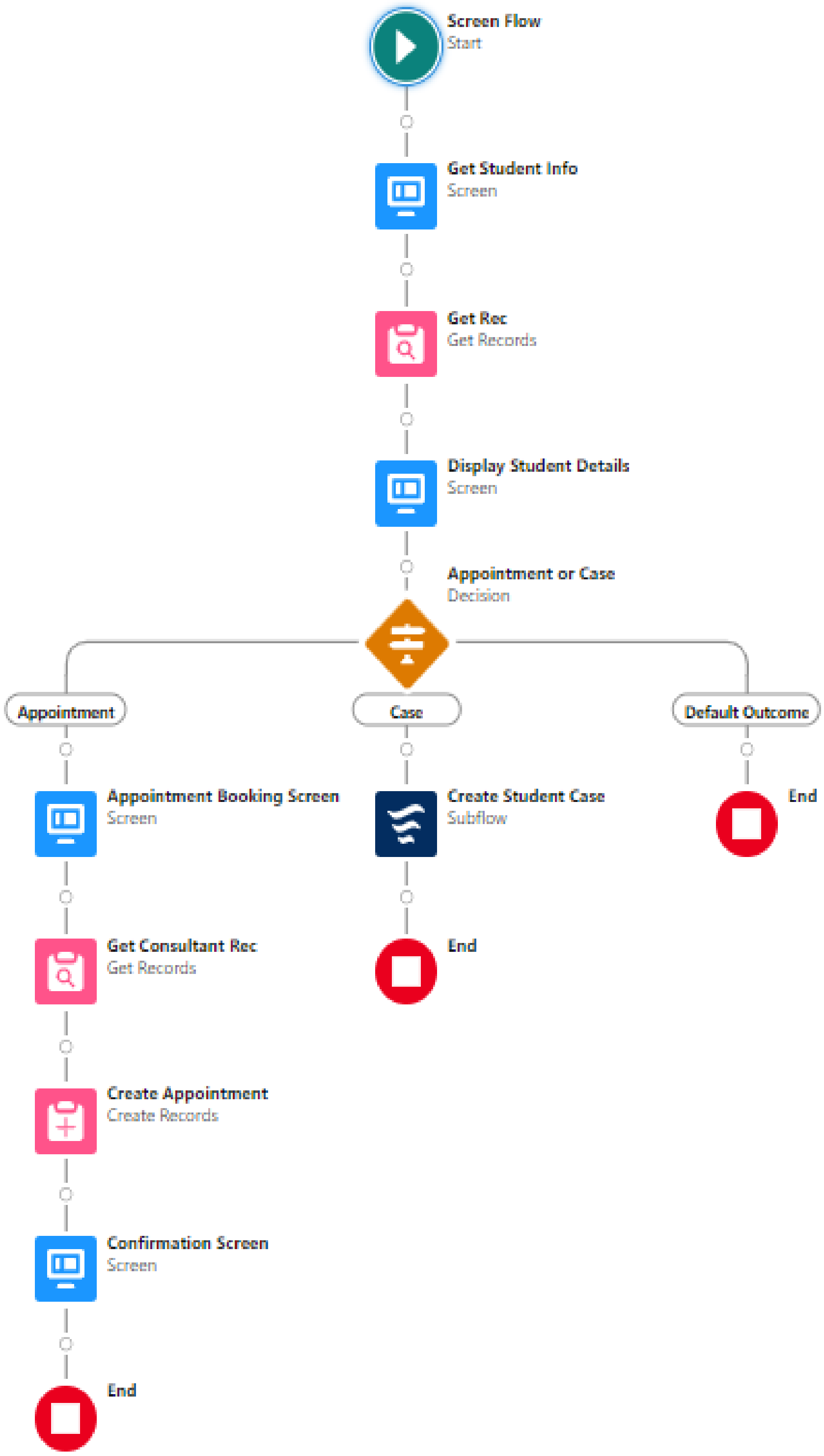
9. Add a Subflow Element for Case Creation

1. Add a Subflow Element:
   - Drag and drop a "Subflow" element onto the canvas, after the Decision Element, on the Case path.
   - Search and Select: "Create a Case".
   - Label: Enter "Create Student Case".

10. Finalize the Flow

1. Save and Activate the Flow:
   - Save the flow with the label "EduConsultantPro Existing Student Flow".
   - Click "Activate" to make the flow live.

This configuration will allow users to book an appointment or create a case depending on their selection. The flow will display necessary screens, retrieve relevant records, and create the required records accordingly. If you need further assistance, feel free to ask!



Topic 6: Create a ScreenFlow to Combine all the flows at one place

1. Add a Welcome Screen Element

1. **Add a Screen Element:**
   - Drag and drop the "Screen" element onto the canvas.
   - **Label:** Enter "Welcome Screen".
2. **Configure Display Text Component:**
   - From the left side panel, search for the "Display Text" component and drag it onto the main panel.
   - **Label:** Enter "SuccessMessage".
   - **Text:** Paste the following content:

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" to save the screen configuration.

2. Add Existing or New Student Confirmation Screen

1. Add a Screen Element:

- Drag and drop another "Screen" element onto the canvas, after the "Welcome Screen".

- **Label:** Enter "Existing or New Student Confirmation Screen".

2. **Add Radio Button Component:**
   - From the left side panel, drag and drop the "Radio Buttons" component onto the screen.
   - **Label:** Enter "Are you an Existing Student".
   - **Choices:**
     - Click "Add Choice".
     - Type "Yes" in the input field and click "Create Yes choice".
     - Repeat for "No" to create a "No" choice.
   - Click "Done" to save the screen configuration.

3. **Add a Decision Element**

   1. **Add a Decision Element:**
      - Drag and drop the "Decision" element onto the canvas, after the "Existing or New Student Confirmation Screen".
      - **Label:** Enter "Decision 1".
   2. **Configure Outcomes:**
      - **Outcome Label:** Enter "If Existing Student".
        - **Resource:** {!Are_you_an_Existing_Student}
        - **Operator:** Equals

- **Value:** {!Yes}

- Click on the "+" icon to add another outcome.
- **Outcome Label:** Enter "If Not an Existing Student".
  - **Resource:** {!Are_you_an_Existing_Student}
  - **Operator:** Equals
  - **Value:** {!No}
- Click "Done" to save the decision element.

4. **Add Subflow Elements**

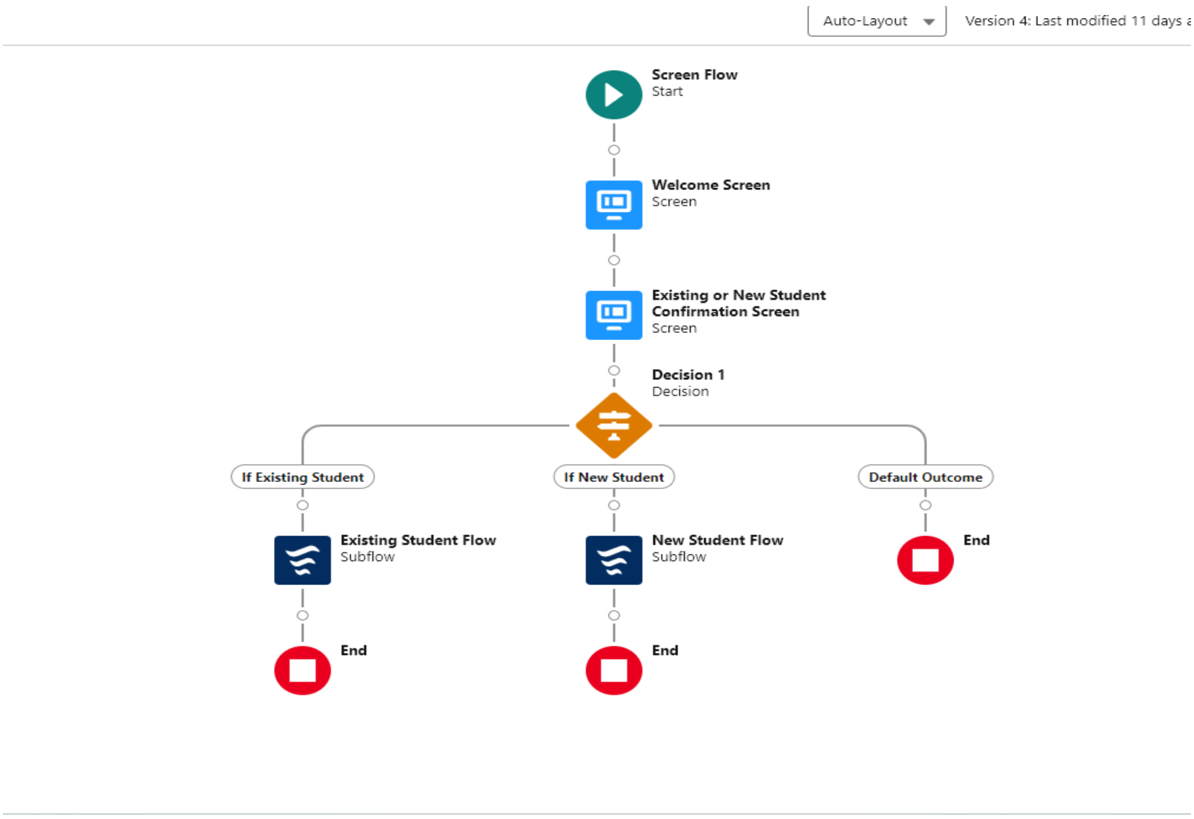
   1. **For Existing Students:**
      - Drag and drop a "Subflow" element onto the canvas, after the "Decision 1" element on the "If Existing Student" path.
      - **Search and Select:** "EduConsultantPro Existing Student Flow".
      - **Label:** Enter "Existing Student Flow".
   2. **For New Students:**
      - Drag and drop another "Subflow" element onto the canvas, after the "Decision 1" element on the "If Not an Existing Student" path.
      - **Search and Select:** "EduConsultantPro Student Flow".

- **Label:** Enter "New Student Flow".

5. Save the Flow

1. **Save and Label the Flow:**
    - Click "Save".
    - **Flow Name:** Enter "EduConsultPro Flow".
2. **Activate the Flow:**
    - Click "Activate" to make the flow live.

This configuration will allow the flow to display a welcome message, determine if the user is an existing student or a new student, and then route them to the appropriate subflow based on their response. If you have any additional questions or need further assistance, feel free to ask!



Topic 8: Create a lightning app page

1. Create a New Lightning App Page

1. **Navigate to Lightning App Builder:**
   - From Setup, enter "App Builder" in the Quick Find box.
   - Click "Lightning App Builder".
2. **Start a New Page:**
   - Click "New".
   - Select "Home Page".
   - Click "Next".
3. **Configure Page Details:**
   - **Page Name:** Enter "EduConsultPro Home Page".
   - **Template:** Select "Standard Home Page".
   - Click "Done".

2. Add Flow Component to the Page

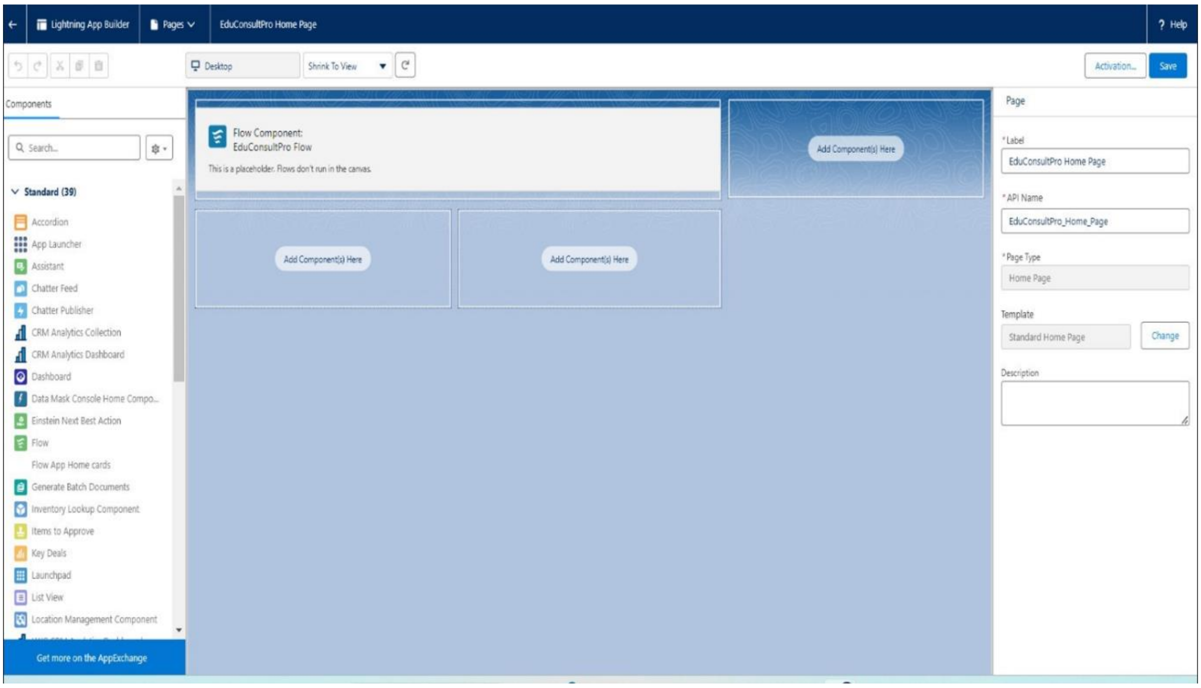
1. **Add Flow Component:**
   - Drag the "Flow" component from the left panel to the top-right region of the page.
2. **Configure Flow Component:**
   - **Flow Name:** Search for "EduConsultantPro Flow".

- Click "Save".

3. Activate the Page

1. **Click "Activate":**
   - After saving, click "Activate".
2. **Assign to Apps and Profiles:**
   - Click "App and Profile".
   - Click "Assign to Apps and Profiles".
3. **Assign to Sales App:**
   - Select the "Sales" app.
   - Click "Next".
4. **Assign to Profiles:**
   - Scroll down the list of profiles and select "System Administrator".
   - Click "Next".
5. **Review Assignment:**
   - Review the assignment details.
   - Click "Save".

This will integrate the "EduConsultantPro Flow" into the Sales app's home page, allowing users with the System Administrator profile to access and interact with the flow directly from the home page. If you need any more help, just let me know!


Lightning App Builder
Pages
EduConsultPro Home Page
Help
Desktop
Shrink To View
Activation...
Save
Components
Search...
Standard (39)
Accordion
App Launcher
Assistant
Chatter Feed
Chatter Publisher
CRM Analytics Collection
CRM Analytics Dashboard
Dashboard
Data Mask Console Home Compo...
Einstein Next Best Action
Flow
Flow App Home cards
Generate Batch Documents
Inventory Lookup Component
Items to Approve
Key Deals
Launchpad
List View
Location Management Component
Get more on the AppExchange
Flow Component:
EduConsultPro Flow
This is a placeholder. Flows don't run in the canvas.
Add Component(s) Here
Add Component(s) Here
Add Component(s) Here
Page
* Label
EduConsultPro Home Page
* API Name
EduConsultPro_Home_Page
* Page Type
Home Page
Template
Standard Home Page
Change
Description

Thank You