Service Management Platform for Institutions(CRM)

By

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Project Abstract

EduConsultPro Institute, a leading educational institution renowned for offering a diverse array of courses and programs, is experiencing rapid growth in student interest and enrollment. With an increasing number of prospective students seeking admission each year, the institute faces the challenge of efficiently managing the complexities of the admission process, handling student inquiries, and providing expert consulting services.

To address these challenges and elevate the student experience, EduConsultPro is implementing Salesforce CRM as a robust solution to streamline and automate its operations. The integration of Salesforce CRM will allow the institute to centralize and manage student data, inquiries, and admissions processes more effectively. Prospective students will benefit from a seamless, transparent application journey, with real-time updates on their application status and personalized communication tailored to their needs.

For admissions staff, Salesforce CRM will significantly reduce the administrative burden by offering tools to track, review, and process applications more efficiently. With automated workflows, case management, and analytics, the staff will be better equipped to handle inquiries and resolve issues promptly. Additionally, the CRM will enable the institute to capture and analyze key data insights, improving decision-making and long-term planning for both admissions and student engagement.

By leveraging Salesforce CRM, EduConsultPro Institute is not only optimizing its admission process but also creating a more responsive, student-centric environment. This transformation will enhance operational efficiency, improve communication between students and staff, and ultimately reinforce the institute’s commitment to delivering exceptional educational experiences.

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1.Introduction

EduConsultPro Institute, distinguished for its diverse and impactful educational programs, is implementing a powerful Salesforce CRM solution to support its expanding student community and streamline its services. By automating and organizing its core functions, the institute aims to optimize internal workflows, elevate the user experience, and reinforce its commitment to high-quality educational services.

The integration focuses on three pivotal areas:

1. **Admission Application Management**: By automating admissions, EduConsultPro can capture detailed student profiles, trigger real-time notifications, and provide valuable insights through comprehensive reporting. This enables a faster, more accurate admissions process that adapts to increasing student interest.

2. **Consulting Services Management**: This feature simplifies consulting services for students, allowing them to easily schedule and manage appointments with educational advisors, ensuring they receive timely guidance.

3. **Immigration Case Management**: Tracking immigration cases is critical for international students. This functionality ensures compliance with regulatory requirements, enabling personalized support and providing real-time case updates.

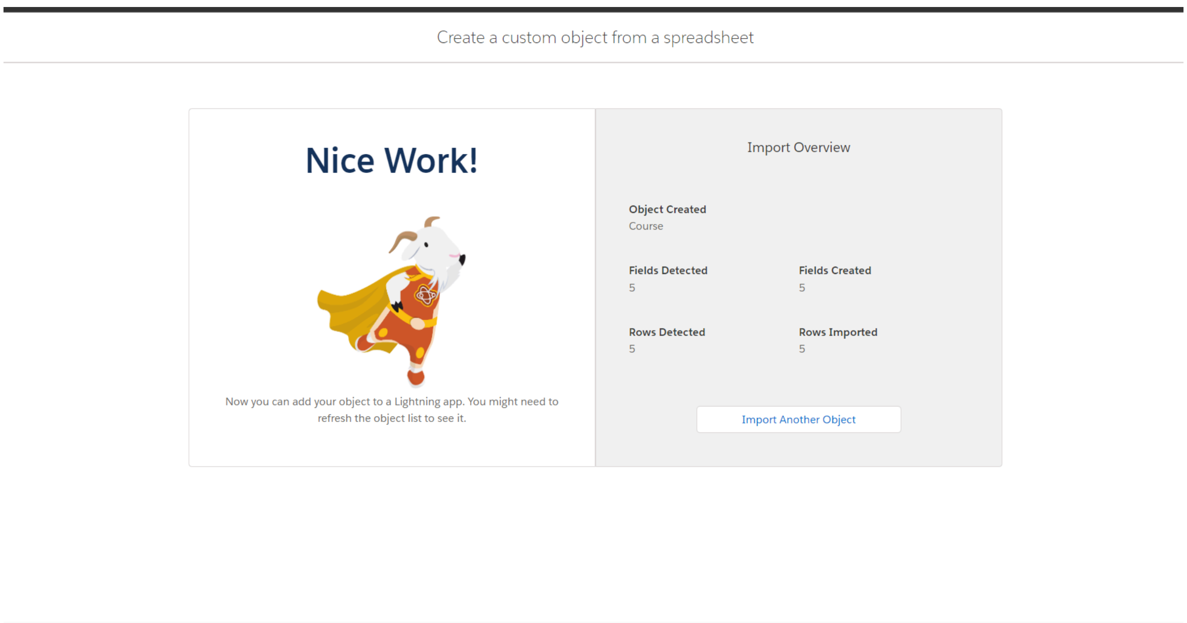
Salesforce's custom objects, user-friendly screen flows, and well-designed approval processes lay the foundation for a seamless, centralized platform accessible through a custom Lightning app page. This unified interface empowers staff with easy access to crucial CRM functions, enhancing productivity and response times.

By leveraging Salesforce CRM, EduConsultPro is positioning itself for future growth, ensuring operational scalability, enriched student engagement, and improved data-driven decision-making, setting new standards in service delivery for the institute.

2.Creating Objects from Spread Sheet

2.1 Create Course object

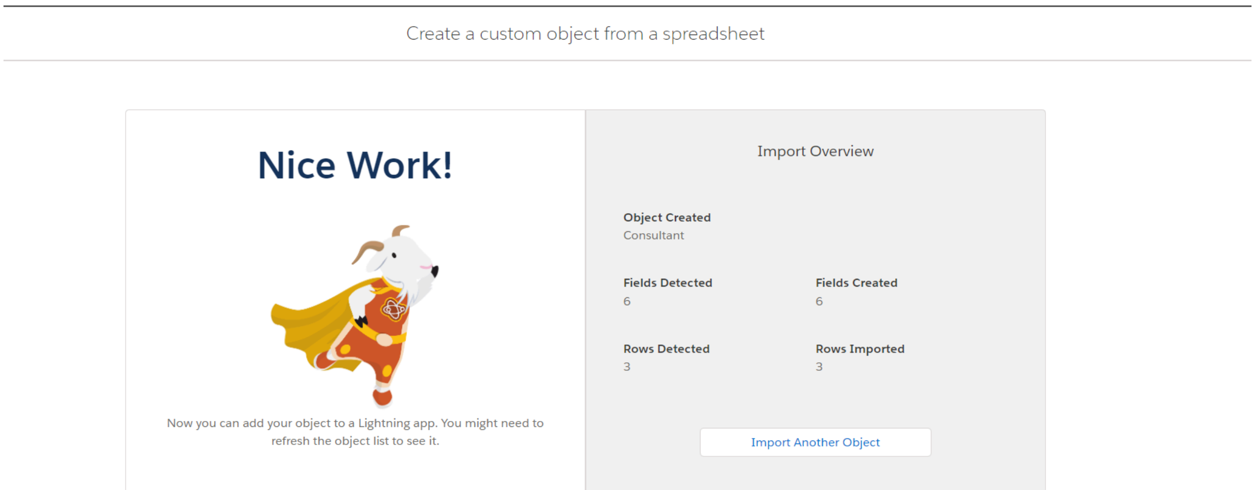
- Open the **Object Manager** in Salesforce.
- Select the option to **Create an Object from a Spreadsheet**.
- Click the provided link to download the spreadsheet labeled **Course**.
- Once downloaded, **upload the file** into Salesforce.
- **Map the fields** from the spreadsheet to the corresponding fields in Salesforce.
- Complete the process by clicking **Upload** to create the new object.



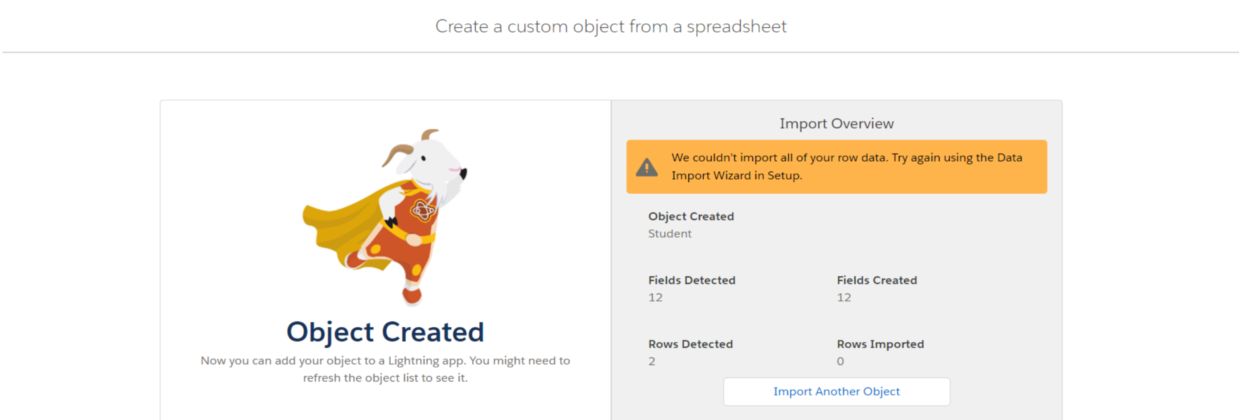
2.2 Create Remaining objects

- **Follow the same steps** used for creating the Course object.
- Download the spreadsheets for the remaining objects:
  - **Consultant**
  - **Student**
  - **Appointment**.
- Open the **Object Manager** in Salesforce.
- Select **Create an Object from a Spreadsheet** for each of the remaining objects.
- **Upload the respective files**: Consultant, Student, and Appointment.
- **Map the fields** for each object to the relevant fields in Salesforce.

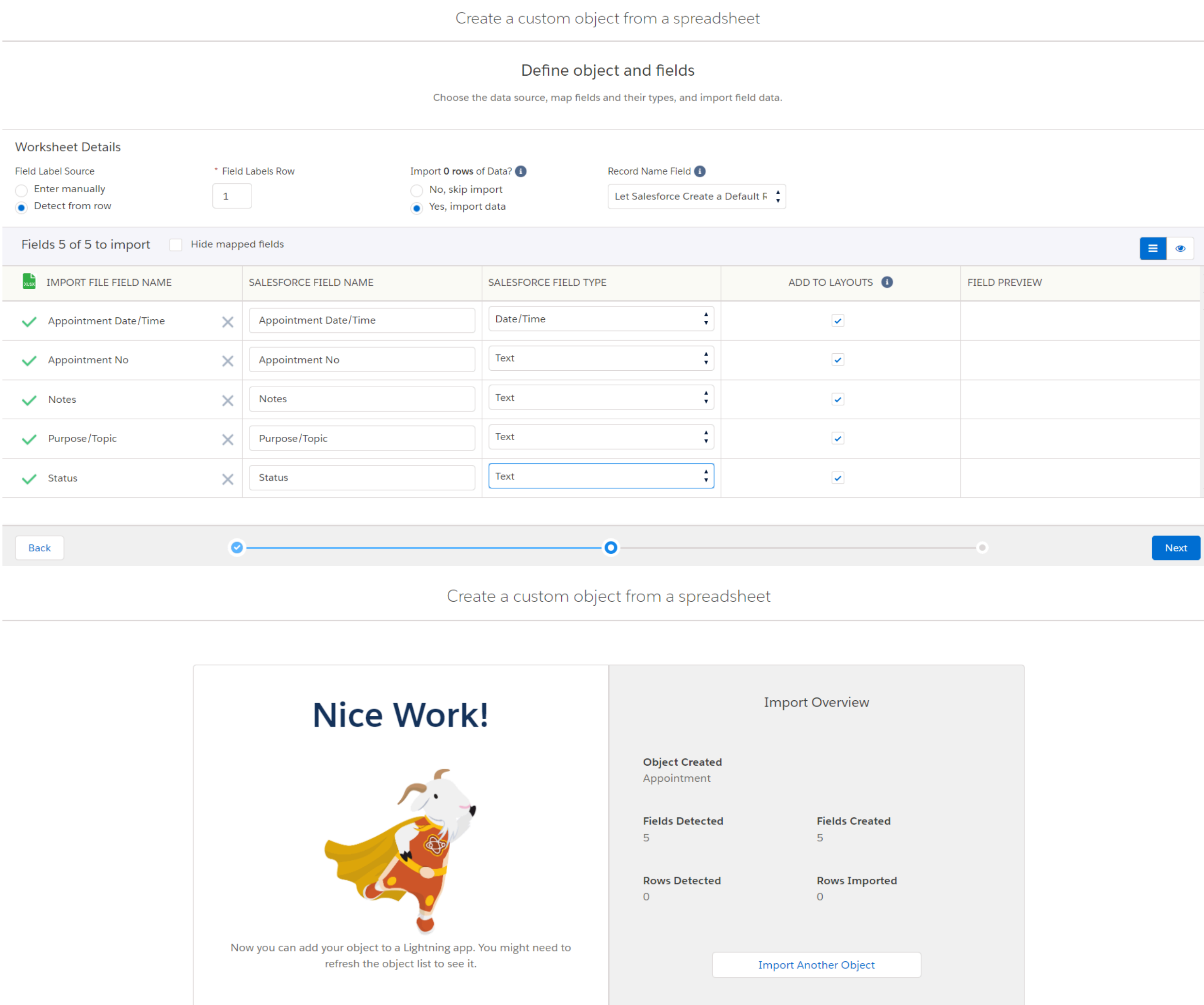
- After mapping, click **Upload** to create each object.



Consultant Object Creation



Student Object Creation



Appointment Object Creation

2.3. Establish Lookup Relationships:

Between Appointment and Student:

1. Access **Object Manager** and locate the **Appointment** object.
2. Go to **Fields & Relationships** and select **New**.
3. Choose **Lookup Relationship** and proceed by clicking **Next**.
4. Select **Student** as the related object and click **Next**.
5. Complete the necessary details and hit **Save** to finalize the connection.

Between Appointment and Consultant:

1. In **Object Manager**, choose the **Appointment** object.
2. Navigate to **Fields & Relationships** and click **New**.
3. Select **Lookup Relationship** and click **Next**.
4. Choose **Consultant** as the related object and proceed.
5. Fill in the required information and click **Save** to create the relationship.

2.3.1. Build the Registration Object:

Steps to build the Registration object:

1. In **Object Manager**, select **Create Custom Object**.
2. Name the new object **Registration**.
3. Add essential fields such as **Student ID** and **Course ID** to capture relevant data.
4. Click **Save** to successfully create the object.

2.3.2. Create a Lookup Relationship Between Student and Case:

Steps to create the relationship:

1. In **Object Manager**, choose the **Case** object.
2. Go to **Fields & Relationships** and click **New**.
3. Select **Lookup Relationship** and click **Next**.
4. Pick **Student** as the related object and proceed.

5. Complete the required details and click **Save** to establish the relationship.

2.4 Configure the Case Object

Editing the Case Object:

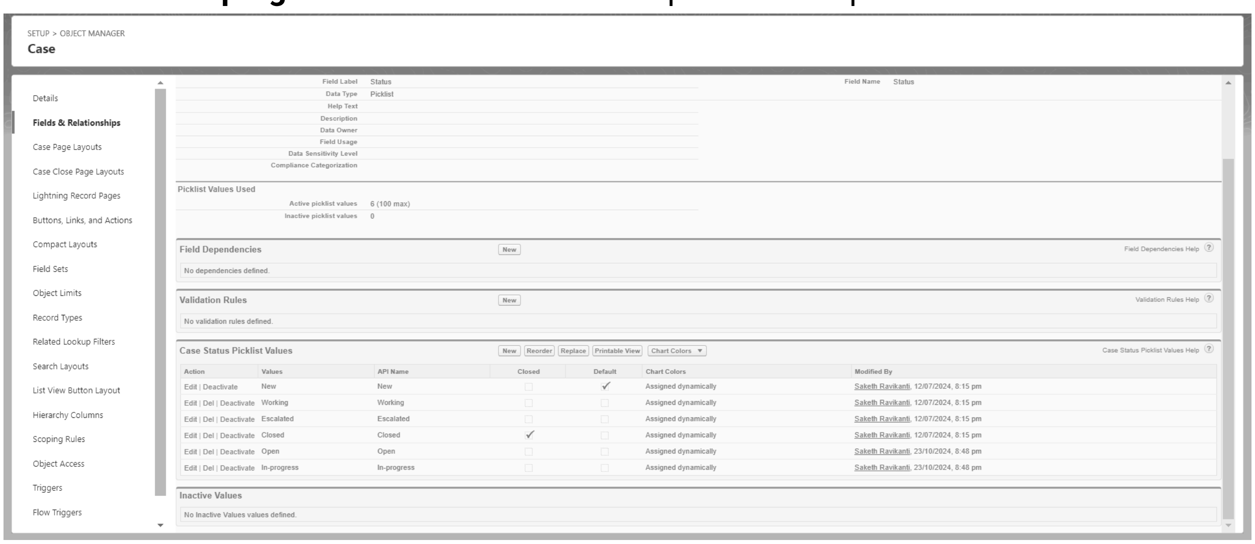
1. Navigate to **Object Manager** in Salesforce.
2. Select **Case** from the list of available objects.

Adding Values to the "Type" Field:

1. Within the Case object, click on **Fields & Relationships**.
2. Locate and select the **Type** field.
3. Click **New** to introduce a new picklist value.
4. Enter **Immigration** and click **Save & New**.
5. Enter **Visa Application** and click **Save** to finalize the addition.

Adding Values to the "Status" Field:

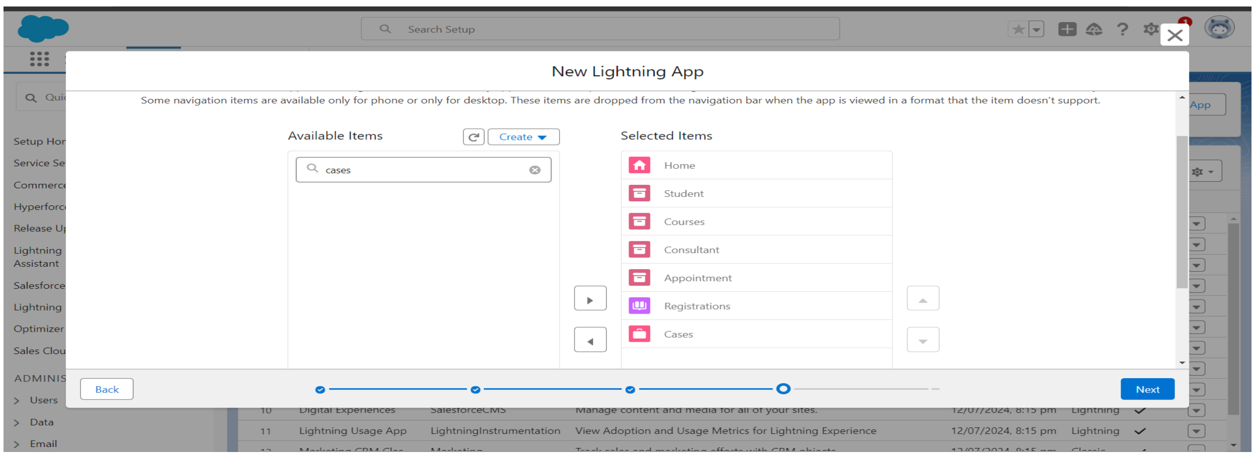
1. Return to **Fields & Relationships** in the Case object.
2. Find and select the **Status** field.
3. Click **New** to add a new picklist value.
4. Enter **Open** and click **Save & New**.
5. Enter **In-progress** and click **Save** to complete this step.



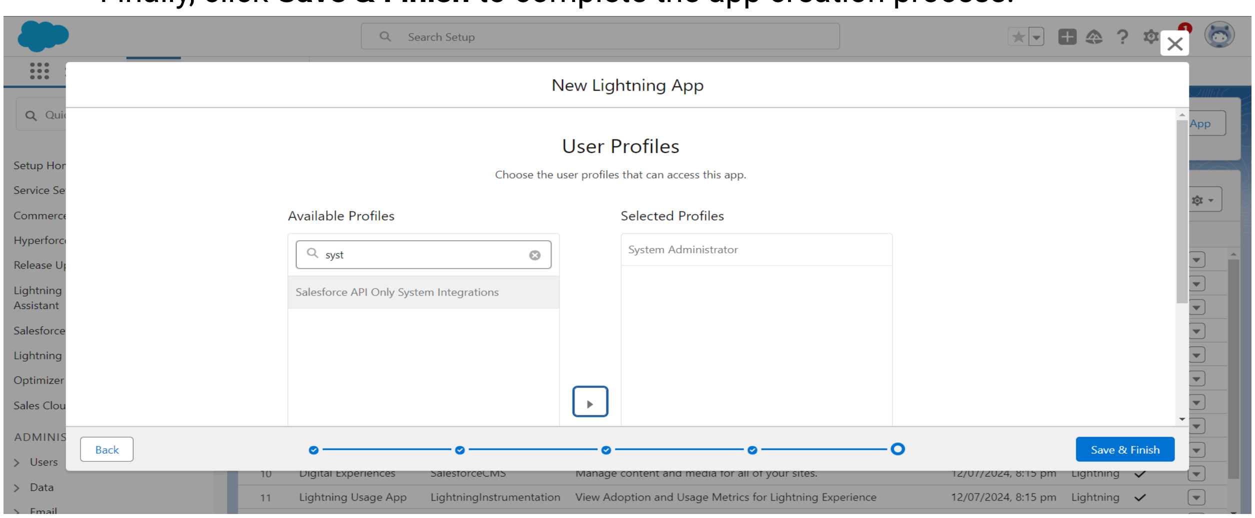
2.5 Create a Lightning App

- Navigate to **Setup** in Salesforce.

- In the **Quick Find** box, search for **App Manager**.
- Click on **New Lightning App** to start creating a new app.
- Enter the app name as **"EduConsultPro"**, then click **Next** three times to proceed through the setup.
- From the **Available Items**, select the following items to add to the app:
    - Home
    - Students
    - Courses
    - Consultants
    - Appointments
    - Registrations
    - Cases



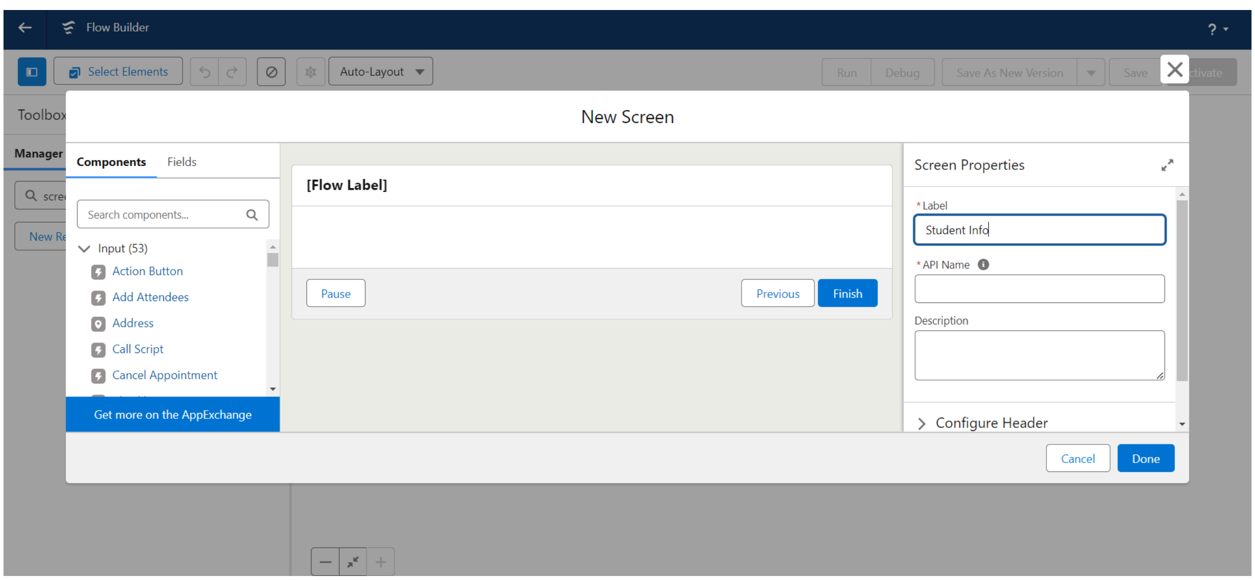
- From the **Available Profiles**, select **System Administrator** and add it to the **Selected Profiles**.
- Finally, click **Save & Finish** to complete the app creation process.



3.Create a ScreenFlow for Student Admission Application process.

3.1 Add Screen Element

- In **Setup**, enter **Flow Builder** in the **Quick Find** box and select **New Flow**.
- Choose **Screen Flow** to begin creating a new flow.
- Add a **Screen** element to the flow.
- In the **Screen Properties** pane, set the **Label** to **"Student Info"**.
- Click on **Fields** in the toolbar.
- Click on the **Record Variable Input** and create a new resource called **StudentRecordRes** to represent the **Student** object.
- Drag the necessary fields from the **Student** object onto the screen, ensuring all the required fields are included to collect student information.
- Complete the setup by adjusting the field placements as needed to create a form for capturing student details.

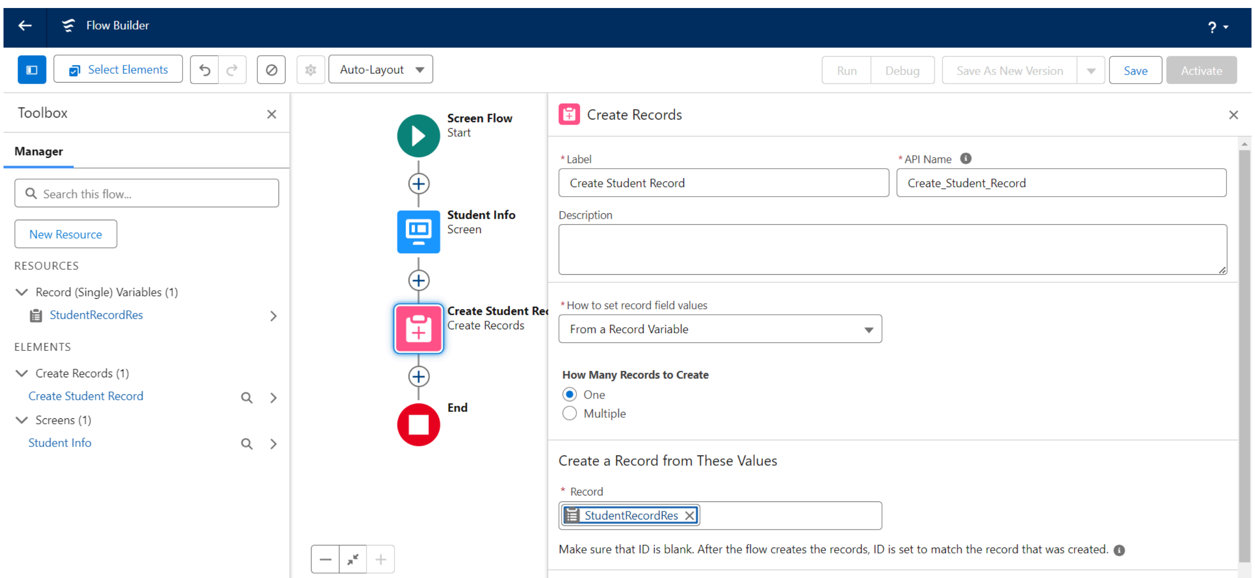


3.2 Create Student Record using Create Element

- After adding the **Student Info** screen element to the flow, insert a new **Create** element to proceed with record creation.
- Label this new element as **"Create Student Record"** to clearly indicate its

purpose of creating a student record in the system.

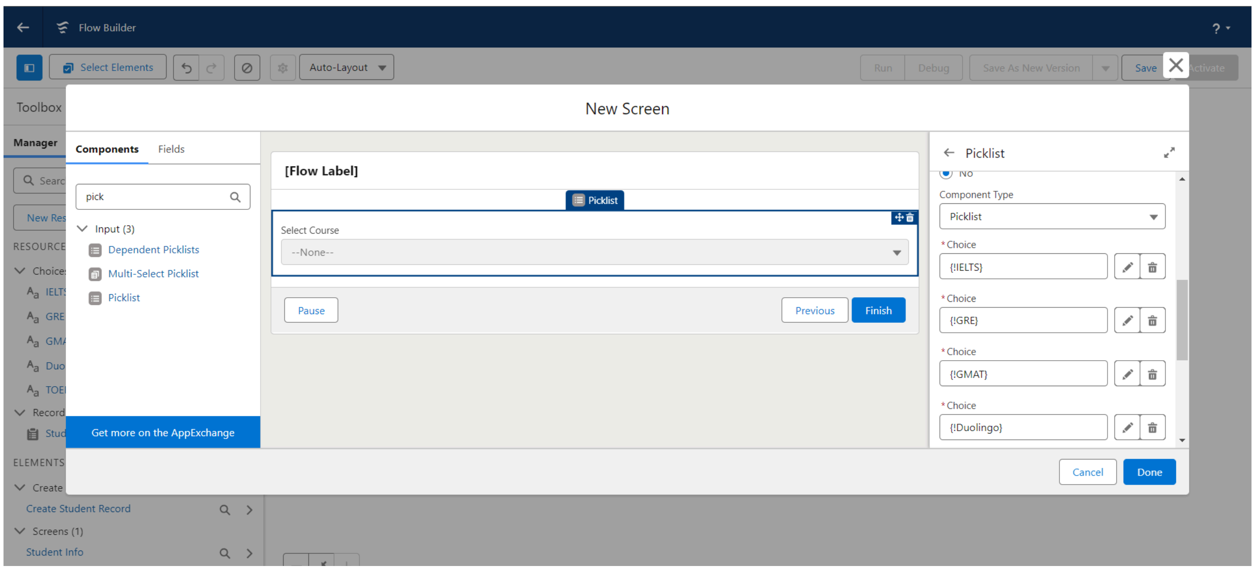
- Under the **How many records to Create** option, select **"One"**, as we only need to create a single student record from the information entered in the form.
- Next, under **How to Set the record fields**, choose the option **"Use all values from a record"**. This will allow the system to automatically use all the data captured in the previous screen to populate the student record.
- For the record data, select the **StudentRecordRes** variable, which was defined in the **Student Info** screen element. This variable holds all the input fields filled out by the user.
- By setting this, the flow will create a student record using the data entered in the form, ensuring the information is properly captured and stored in the system. This simplifies the record creation process and ensures all student details are recorded seamlessly.



3.3 Add Screen Element

- After the **Create Student Record** element, add a new **Screen** element to the flow.
- Label this new screen as **"Course Screen"** to indicate that the user will select a course.
- From the left side panel, drag a **Picklist** component onto the screen to allow course selection.
- Label the picklist as **"Select Course"** to guide users in choosing the course they want to enroll in.

- Under the choices section, type **“IELTS”** and press **Enter**. This will automatically create a variable with the name **IELTS**.
- Repeat the process for other courses:
  - Type **GRE** and press **Enter** (this creates the **GRE** variable).
  - Type **GMAT** and press **Enter** (this creates the **GMAT** variable).
  - Type **Duolingo** and press **Enter** (this creates the **Duolingo** variable).
  - Type **TOEFL** and press **Enter** (this creates the **TOEFL** variable).
- This picklist will now allow users to select from the provided course options: IELTS, GRE, GMAT, Duolingo, and TOEFL. Each choice is tied to a variable that can be used later in the flow.



3.4 Add Decision Element

1. Add the Decision Element:

- After the **Select Course** screen element, insert a **Decision** element into the flow.
- Label this element as **“Selecting Course”** to indicate the decision-making process based on the user’s course selection.

2. Configure the First Outcome (IELTS):

- In the **Outcome** section, click **Add Outcome**.
- Label the outcome as **“Selected IELTS”**.
- Define the condition:
  - **Resource**: Select **Select_Course** (the screen component from the **Select**

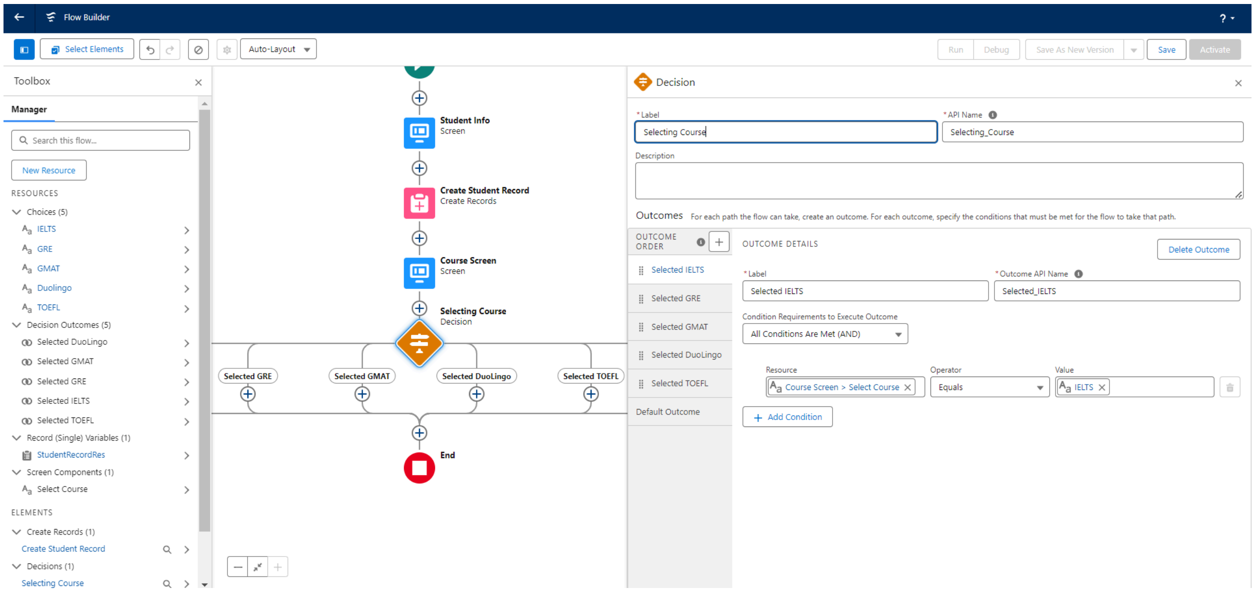
Course screen).
    - **Operator**: Set to **Equals**.
    - **Value**: Select **IELTS** (the choice variable created for the IELTS course).

3. Add More Outcomes for Other Course Options:

- Click the **“+”** icon to add more outcomes. Follow the same process for each of the following courses:
    - **GRE**:
        - **Outcome Label**: "Selected GRE"
        - **Condition**:
            - **Resource**: Select_Course
            - **Operator**: Equals
            - **Value**: GRE
    - **GMAT**:
        - **Outcome Label**: "Selected GMAT"
        - **Condition**:
            - **Resource**: Select_Course
            - **Operator**: Equals
            - **Value**: GMAT
    - **Duolingo**:
        - **Outcome Label**: "Selected Duolingo"
        - **Condition**:
            - **Resource**: Select_Course
            - **Operator**: Equals
            - **Value**: Duolingo
    - **TOEFL**:
        - **Outcome Label**: "Selected TOEFL"
        - **Condition**:
            - **Resource**: Select_Course
            - **Operator**: Equals
            - **Value**: TOEFL

4. Finalize the Decision Element:

- Once all outcomes are added for each course (IELTS, GRE, GMAT, Duolingo, TOEFL), click **Done**.



3.5 Add GET Record Element

1. Add the GET Record Element for IELTS Path:

- After the **Decision** element, specifically under the **IELTS** outcome path, insert a **GET Record** element.
- Label this element as **"Get IELTS Rec"** to specify that it is fetching the record for the IELTS course.

2. Configure the GET Record Element for IELTS:

- **Object**: Select **Course** as the object from which to retrieve records.
- **Condition Requirements**: Choose **All Conditions are Met (AND)** to ensure the correct record is fetched.
- **Field**: Set **Course Name** as the field.
- **Operator**: Choose **Equals**.
- **Value**: Select **{!Select_Course}**, which is the variable from the **Select Course** picklist screen component.

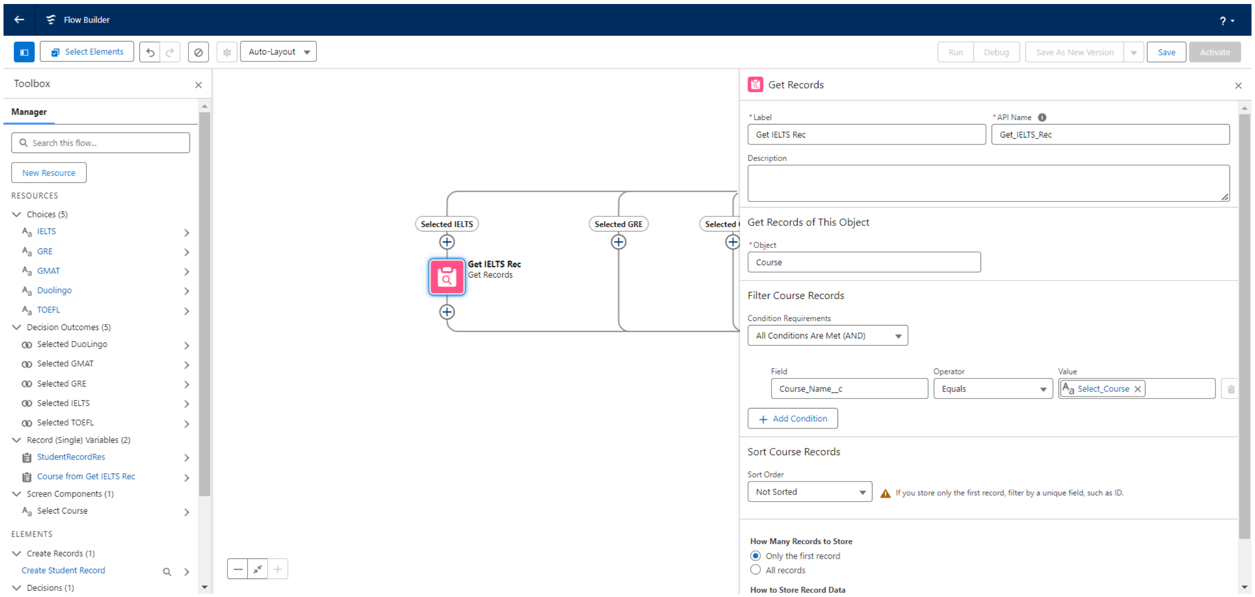
3. Repeat Steps for Other Course Paths:

- **GRE Path**:
  - Add a GET Record element labeled **"Get GRE Rec"**.
  - Object: **Course**.

        - Condition Requirements: **All Conditions are Met (AND)**.
        - Field: **Course Name**.
        - Operator: **Equals**.
        - Value: **{!Select_Course}**.
    - **GMAT Path**:
        - Add a GET Record element labeled **“Get GMAT Rec”**.
        - Object: **Course**.
        - Condition Requirements: **All Conditions are Met (AND)**.
        - Field: **Course Name**.
        - Operator: **Equals**.
        - Value: **{!Select_Course}**.
    - **TOEFL Path**:
        - Add a GET Record element labeled **“Get TOEFL Rec”**.
        - Object: **Course**.
        - Condition Requirements: **All Conditions are Met (AND)**.
        - Field: **Course Name**.
        - Operator: **Equals**.
        - Value: **{!Select_Course}**.
    - **DuoLingo Path**:
        - Add a GET Record element labeled **“Get DuoLingo Rec”**.
        - Object: **Course**.
        - Condition Requirements: **All Conditions are Met (AND)**.
        - Field: **Course Name**.
        - Operator: **Equals**.
        - Value: **{!Select_Course}**.

4. Finalize:

- Complete these steps for each path (IELTS, GRE, GMAT, TOEFL, DuoLingo) to ensure the flow fetches the correct course record based on the user's selection.



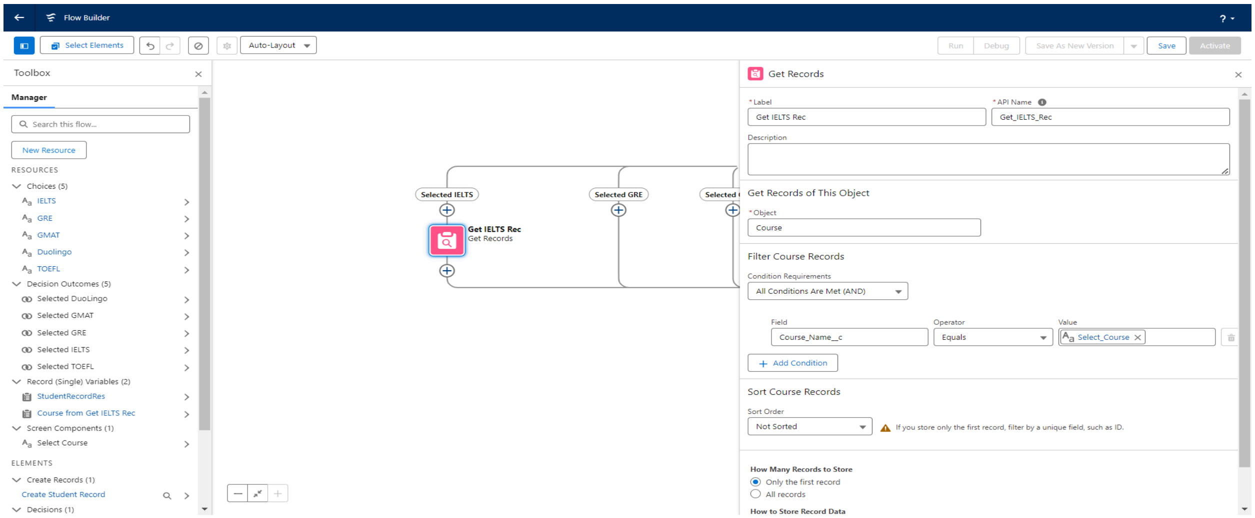
3.6 Create Registration Record using Create Records Element

1. Add a Create Element for the IELTS Path:

- After the **Get IELTS Rec** element, add a **Create** element to the flow.
- Label the element as **"Create IELTS Registration Rec"** to indicate that it will create a registration record for the IELTS course.

2. Configure the Create Element for IELTS:

- **How many records to create**: Select **One**, as you are creating a single registration record.
- **How to set the record fields**: Choose **"Use separate resources, and literal values"**. This will allow you to specify each field and value individually.

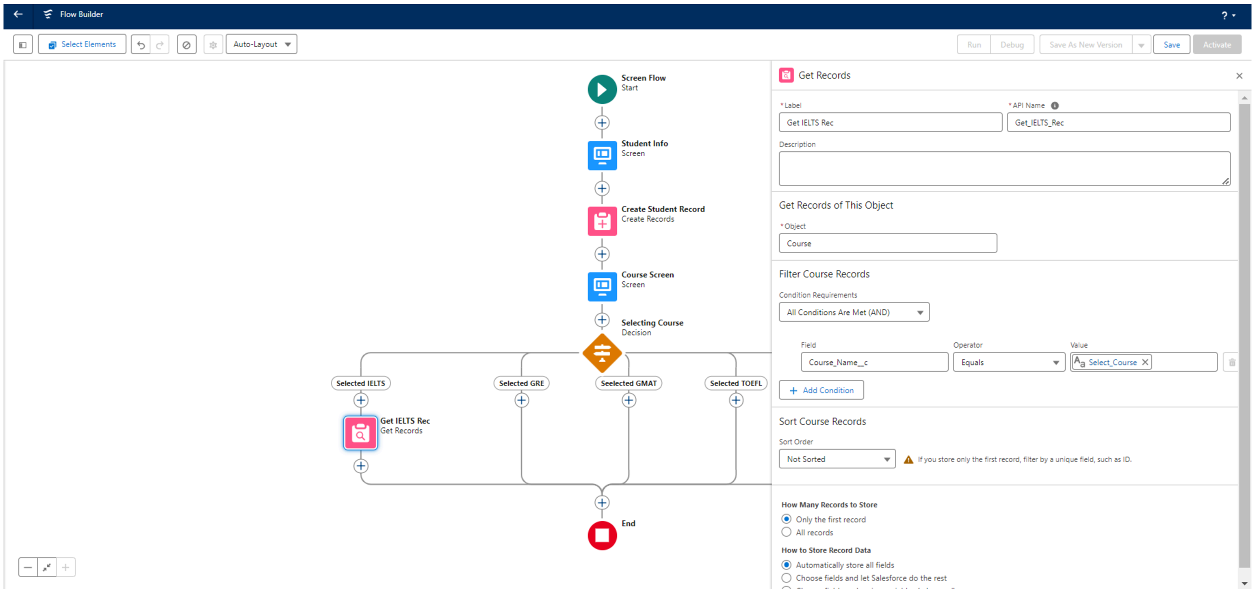


3. Select the Object for Record Creation:

- **Object**: Choose **Registration** as the object for creating the record.

4. Set the Record Fields:

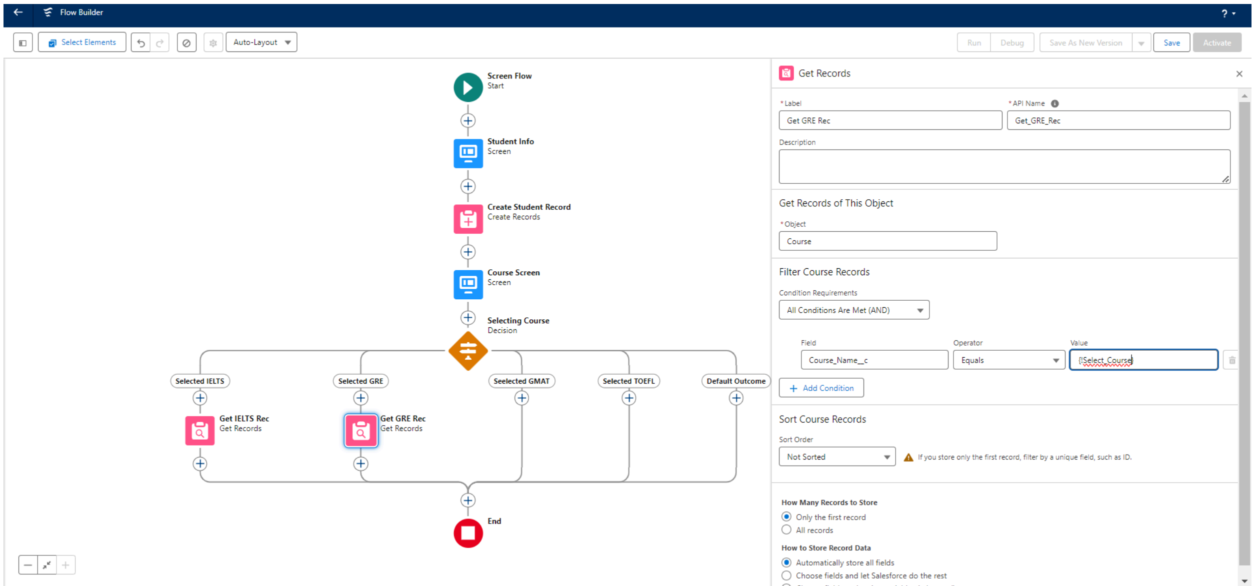
- **Field: Course_Name__c**: Choose **Course_Name__c** as the field to store the selected course.
    - **Value**: Set the value to **{!Get_IELTS_Rec.Id}**, which pulls the course ID from the **Get IELTS Rec** element.
- **Field: Student_Name__c**: Choose **Student_Name__c** to store the student information.
    - **Value**: Set the value to **{!StudentRecordRes.Id}**, which refers to the student record created earlier in the flow.



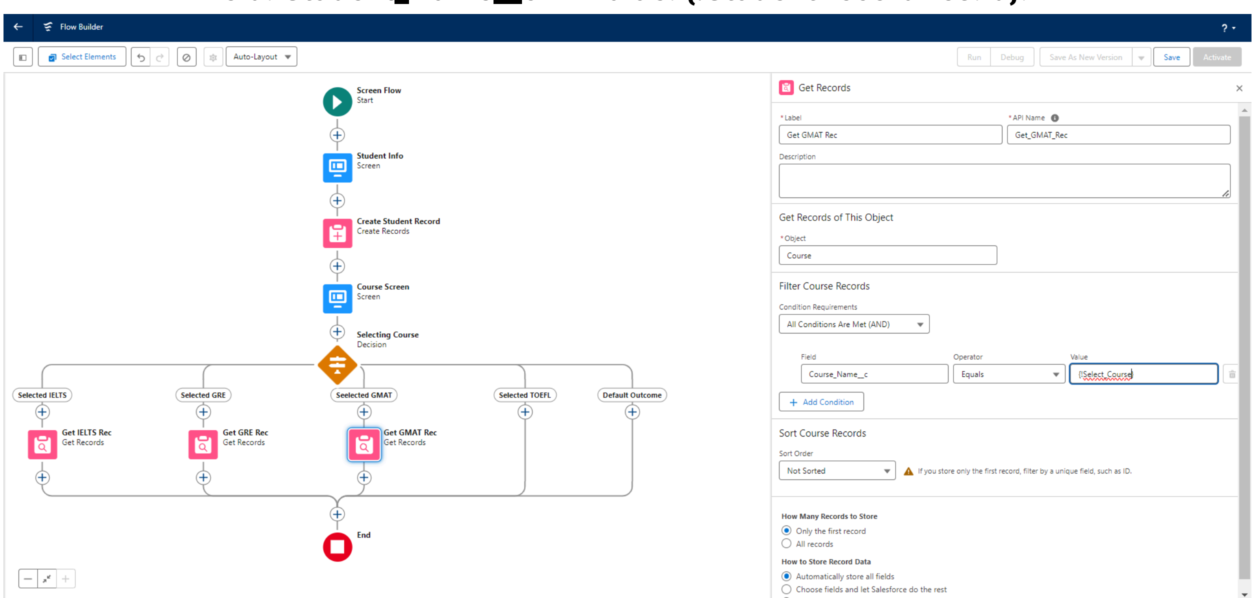
5. Repeat the Steps for Other Course Paths:

For each course path (GRE, GMAT, TOEFL, DuoLingo), repeat the following steps:

- **GRE Path**:
  - Add a Create element labeled **“Create GRE Registration Rec”**.
  - Set it to create **One** record, and choose **“Use separate resources, and literal values”**.
  - **Object**: **Registration**.
  - **Field: Course_Name__c** → **Value: {!Get_GRE_Rec.Id}**.
  - **Field: Student_Name__c** → **Value: {!StudentRecordRes.Id}**.



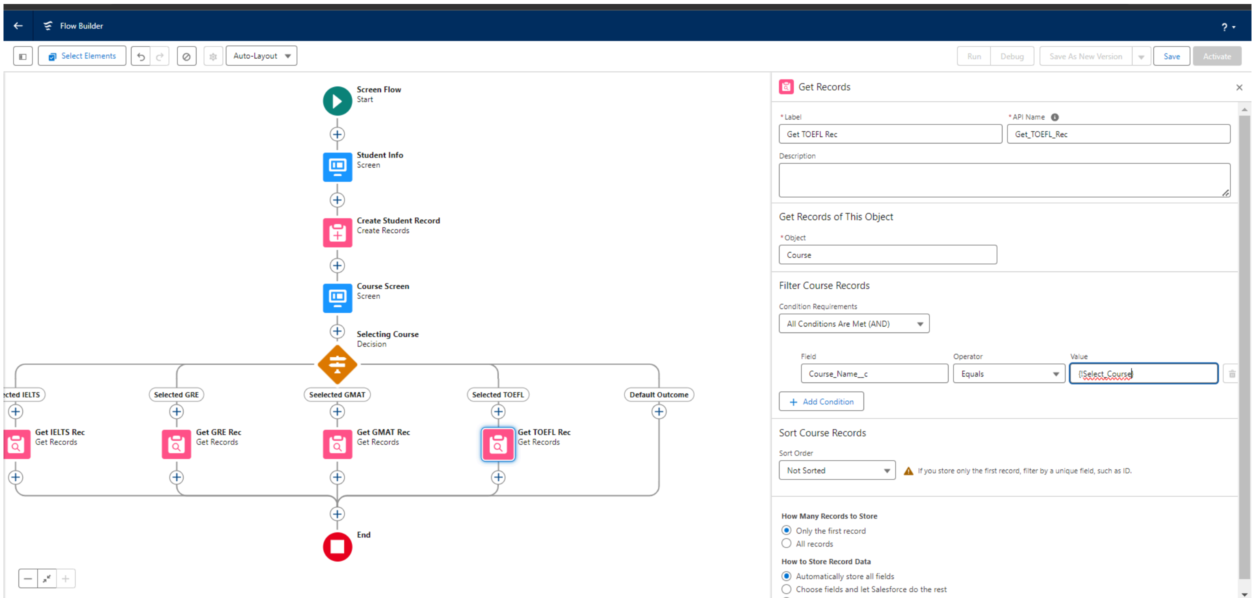
- **GMAT Path**:
    - Add a Create element labeled **"Create GMAT Registration Rec"**.
    - Set it to create **One** record, and choose **"Use separate resources, and literal values"**.
    - **Object**: **Registration**.
    - **Field: Course_Name__c → Value: {!Get_GMAT_Rec.Id}**.
    - **Field: Student_Name__c → Value: {!StudentRecordRes.Id}**.



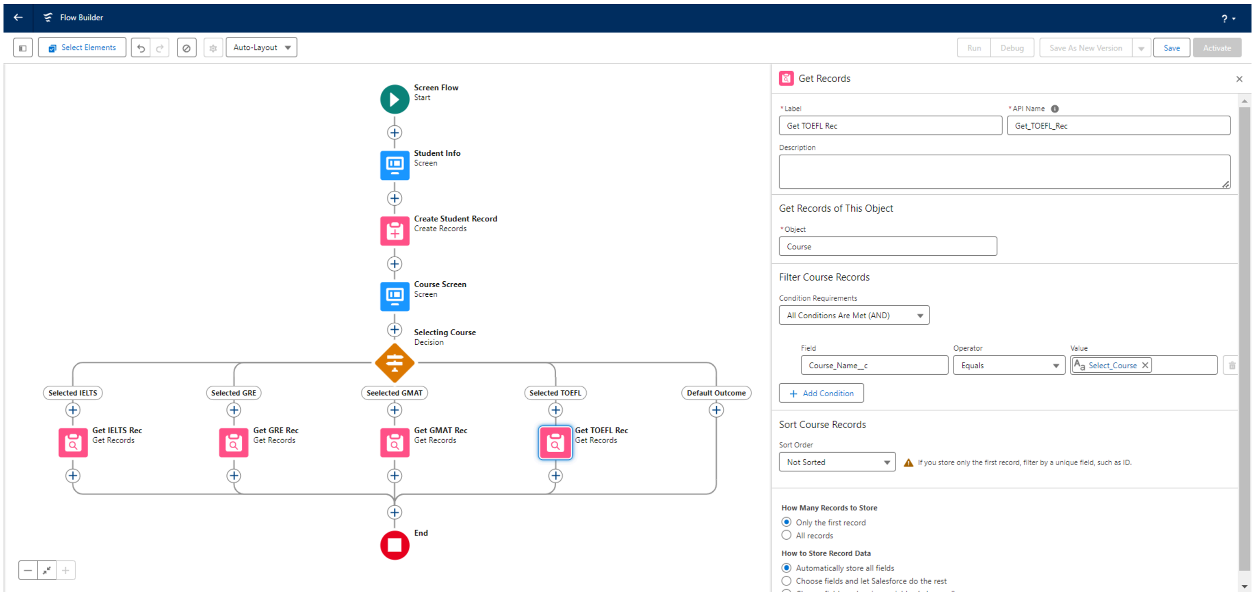
- **TOEFL Path**:
    - Add a Create element labeled **"Create TOEFL Registration Rec"**.
    - Set it to create **One** record, and choose **"Use separate resources, and**

literal values”.

- **Object**: **Registration**.
- **Field: Course_Name__c → Value: {!Get_TOEFL_Rec.Id}**.
- **Field: Student_Name__c → Value: {!StudentRecordRes.Id}**.



- **DuoLingo Path**:
  - Add a Create element labeled **“Create DuoLingo Registration Rec”**.
  - Set it to create **One** record, and choose **“Use separate resources, and literal values”**.
  - **Object**: **Registration**.
  - **Field: Course_Name__c → Value: {!Get_DuoLingo_Rec.Id}**.
  - **Field: Student_Name__c → Value: {!StudentRecordRes.Id}**.



6. Finalize:

- Repeat the above steps for each course path (IELTS, GRE, GMAT, TOEFL, DuoLingo) to ensure a registration record is created based on the course selected by the user and linked to the correct student record.

3.7 Create Email Text Template Variables for email body and subject

1. Open the Toolbox:

- On the left-hand side of the screen in the Flow Builder, click on the **Toggle Toolbox** icon to expand the toolbox.

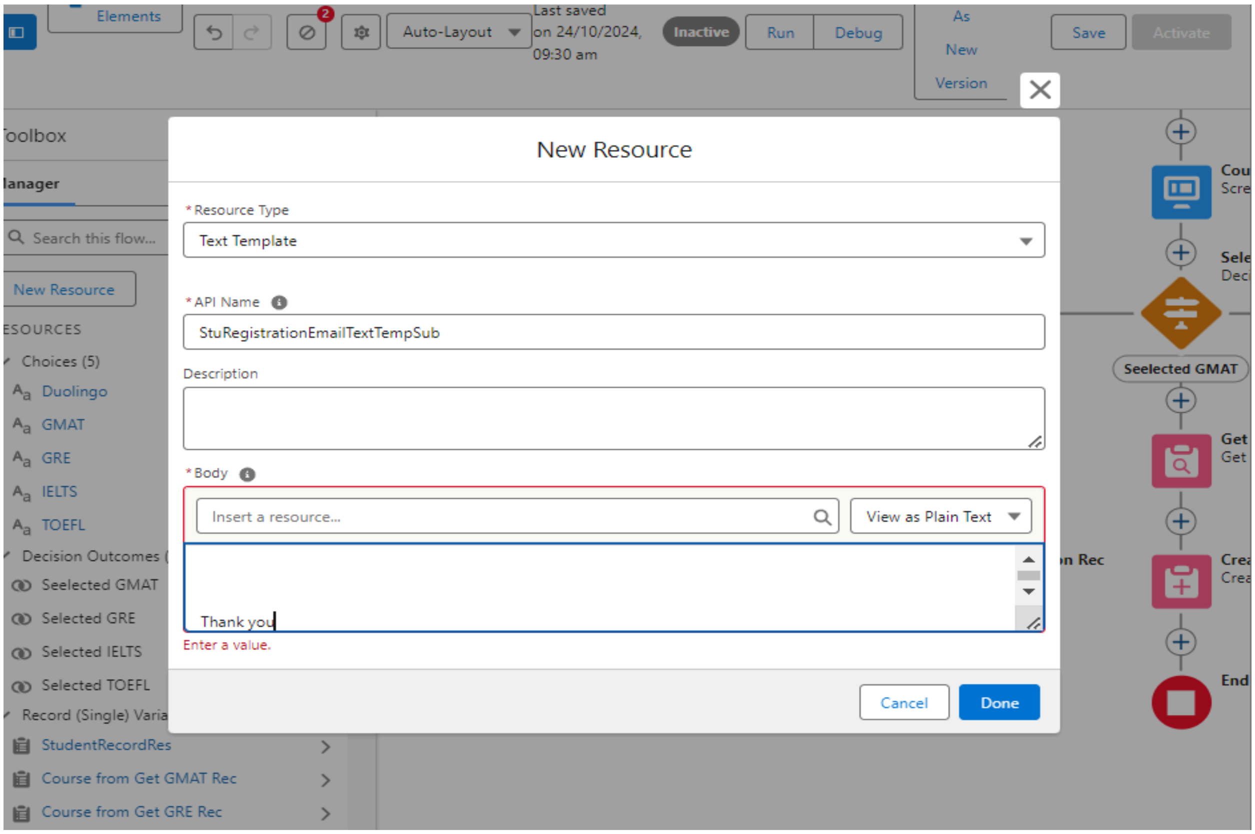
2. Add a New Resource:

- In the toolbox, click on **"New Resource"** to add a new resource to the flow.

3. Select Resource Type:

- From the available options, select **"Text Template"** as the resource type. This will allow you to create a formatted text that can be used in emails or messages.

4. Configure the Text Template:



- **API Name**: Enter **“StuRegistrationEmailTextTempBody”** as the API name for the text template.
- **View as Plain Text**: Select **“View as plain text”** to ensure the body content is displayed as simple text without formatting.

5. Add the Email Body:

- In the **Body** section, paste the desired email text. This will be the message content sent to the student upon registration.

Body:

“Dear {!StudentRecordRes.Name},

Congratulations and welcome to EduConsultantPro!

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

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

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

Explore Our Resources : Take some time to explore the wide range of resources, tools, and services available on the EduConsultantPro platform. From educational insights to immigration advice, we offer comprehensive support tailored to your needs.

Connect with Our Consultants : Our team of experienced consultants is here to assist you at every stage of your educational and immigration endeavors. Don't hesitate to reach out to us with any questions, concerns, or inquiries you may have. We're here to help!

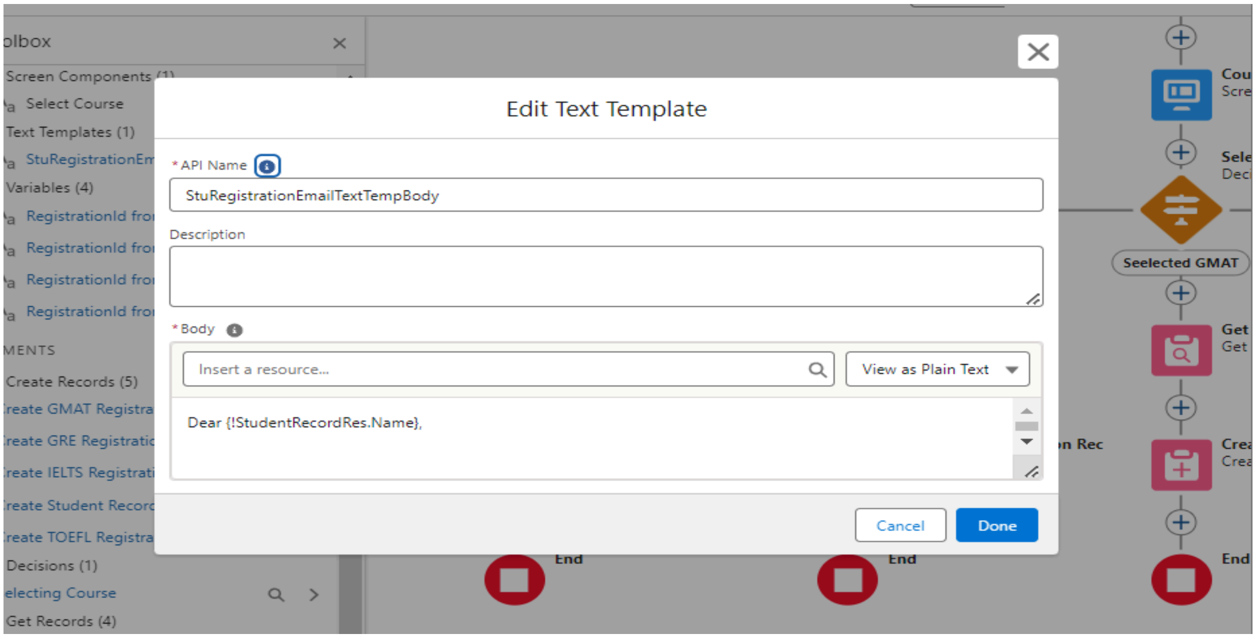
Stay Updated : Keep an eye on your inbox for important updates, announcements, and exclusive opportunities from EduConsultantPro. We'll ensure that you're informed about the latest developments and relevant information to support your journey.

Engage with the Community : Join our vibrant community of students, professionals, and experts who share your passion for education and global opportunities. Connect with like-minded individuals, participate in discussions, and expand your network.

Once again, congratulations on taking this important step towards realizing your academic and career aspirations. We are thrilled to have you as part of the EduConsultantPro family and look forward to supporting you on your journey to success.

If you have any questions or need assistance, please don't hesitate to contact us.

Thank you."



6. Save:

- Once the email body is added, click **Save** to finalize the creation of the text template resource.

7. Click on Done to complete

3.8 Add an Action Element

1. Add an Action Element:

- After completing all the **Decision** paths (IELTS, GRE, GMAT, TOEFL, DuoLingo), add an **Action** element to the flow.
- Label this action as **"Send Email to Student"** to indicate that it will send an email to the student upon course registration.

2. Configure the Action Element:

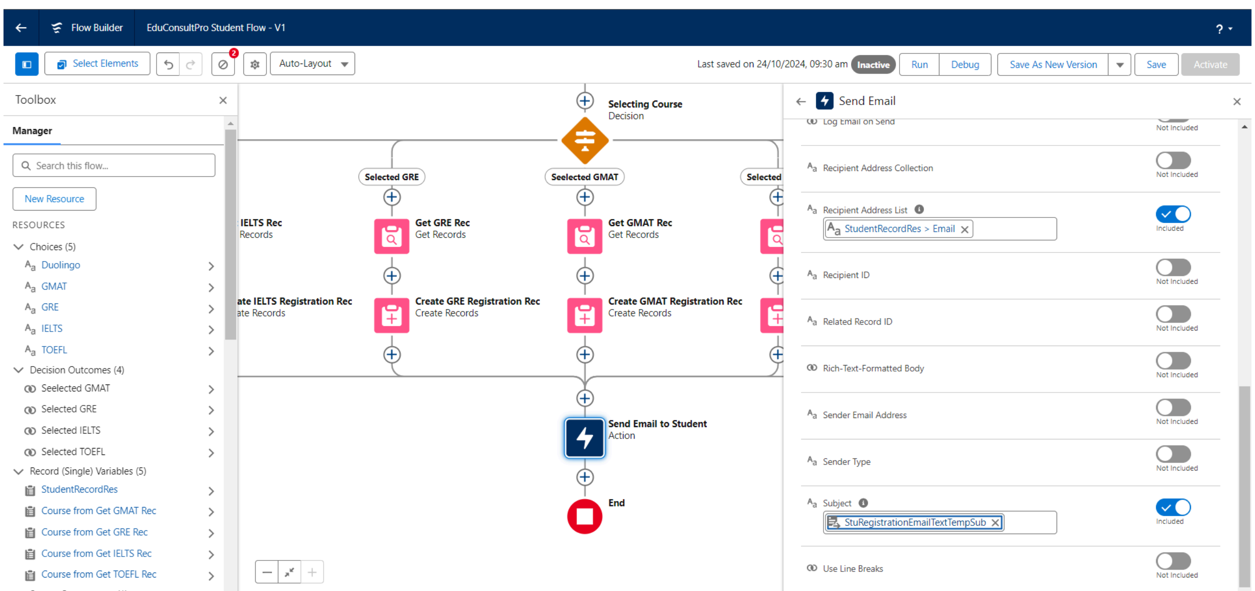
- Under the action settings, find the **"Set input values for selected action"** section. This is where you will specify the content of the email.

3. Set Input Values:

- **Body**: For the email body, select the previously created text template resource.
    - **Input Value**: **{!StuRegistrationEmailTextTempBody}**.
- **Recipient Address List**: For the recipient, use the email address of the student.
    - **Input Value**: **{!StudentRecordRes.Email__c}**, which refers to the email address stored in the student record.
- **Subject**: For the email subject, use a subject template or variable.
    - **Input Value**: **{!StuRegistrationEmailTextTempSub}**, which is the subject of the email.

4. Save the Action:

- Once you've filled in all the necessary input values, click **Save** to finalize the configuration of the **Send Email to Student** action.



3.9 Add Screen Element

1. Add a Screen Element:

- After the **Send Email to Student** action element, add a new **Screen** element to the flow.

- Label this screen as **“Success Screen”** to indicate that it will display a confirmation message to the user.

2. Add a Display Text Component:

- From the left side panel, search for the **Display Text** component.
- Drag the **Display Text** component into the main panel of the **Success Screen**.

3. Configure the Display Text Component:

- **Label**: Name this display text component as **“SuccessMessage”** to easily identify it.
- **Resource Picker Box**: Paste the following message into the resource picker box:

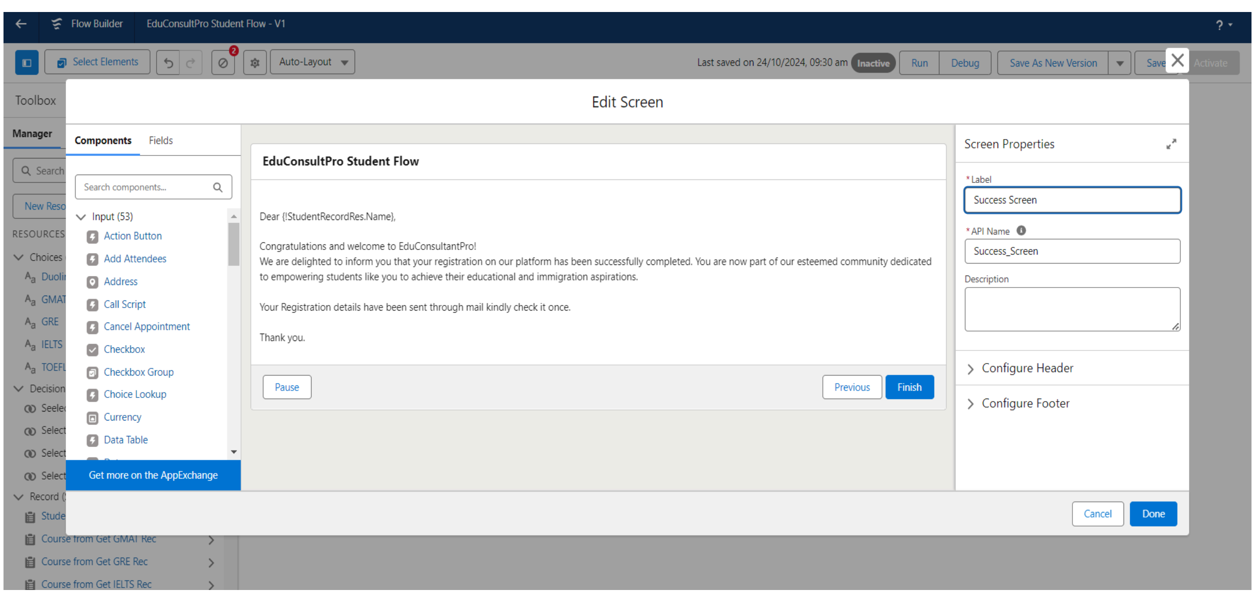
Dear {!StudentRecordRes.Name},

Congratulations and welcome to EduConsultantPro!

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

Your registration details have been sent via email, so please check your inbox.

Thank you.



4. Finalize the Success Screen:

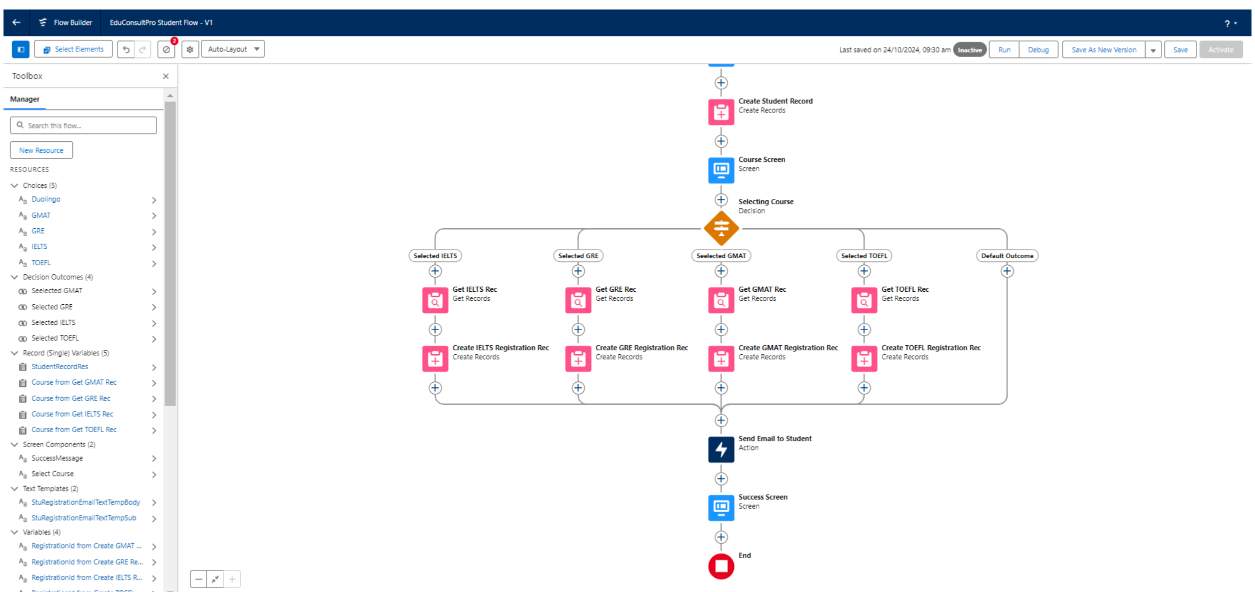
- Once you have added the message, click **Done** to complete the configuration of the **Success Screen**.

5. Save the Flow:

- Save your flow by clicking the **Save** button.
- Name the flow **“EduConsultPro Student Flow”** for easy identification in your Salesforce environment.

6. Review the Flow:

- After saving, review the flow to ensure that it functions as intended. Your flow will now display the success message to students after their registration is completed, confirming their successful enrollment and guiding them to check their email for further details.



4.Create Users

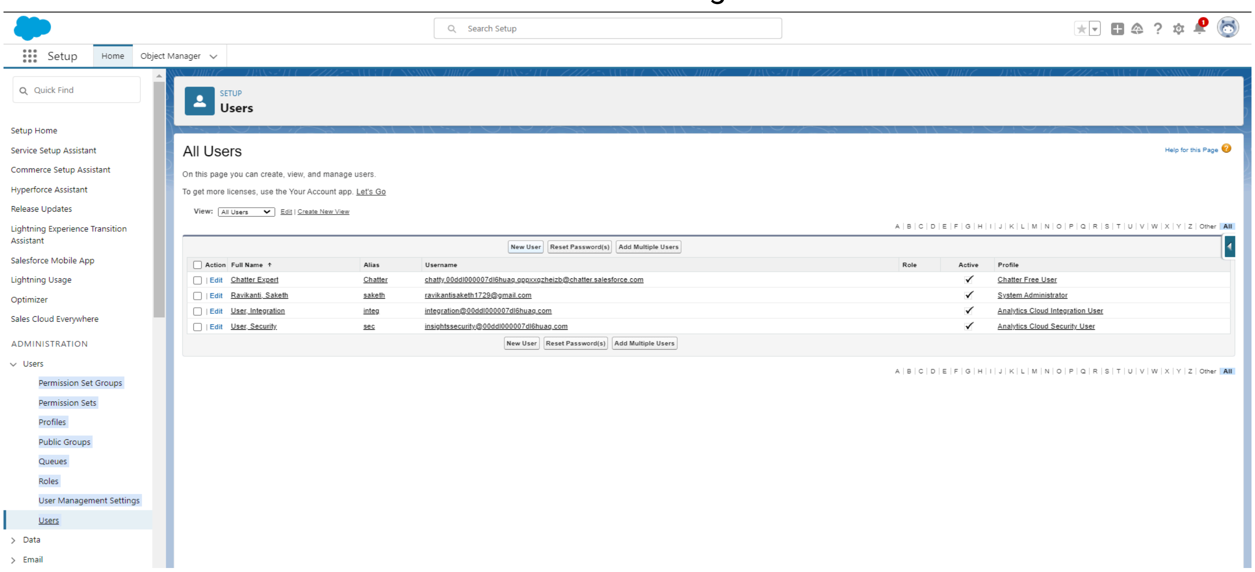
4.1 User

1. Navigate to User Setup:

- Go to **Setup** in Salesforce.
- Under the **Administration** section, click on **Users**.

2. Create a New User:

- Click on the **New User** button to start adding a new user.



3. Enter User Details:

- **Last Name**: Enter **Consultant** in the last name field.
- **License**: Select **Salesforce Platform** as the license type.
- **Profile**: Choose **Standard Platform User** for the user profile.

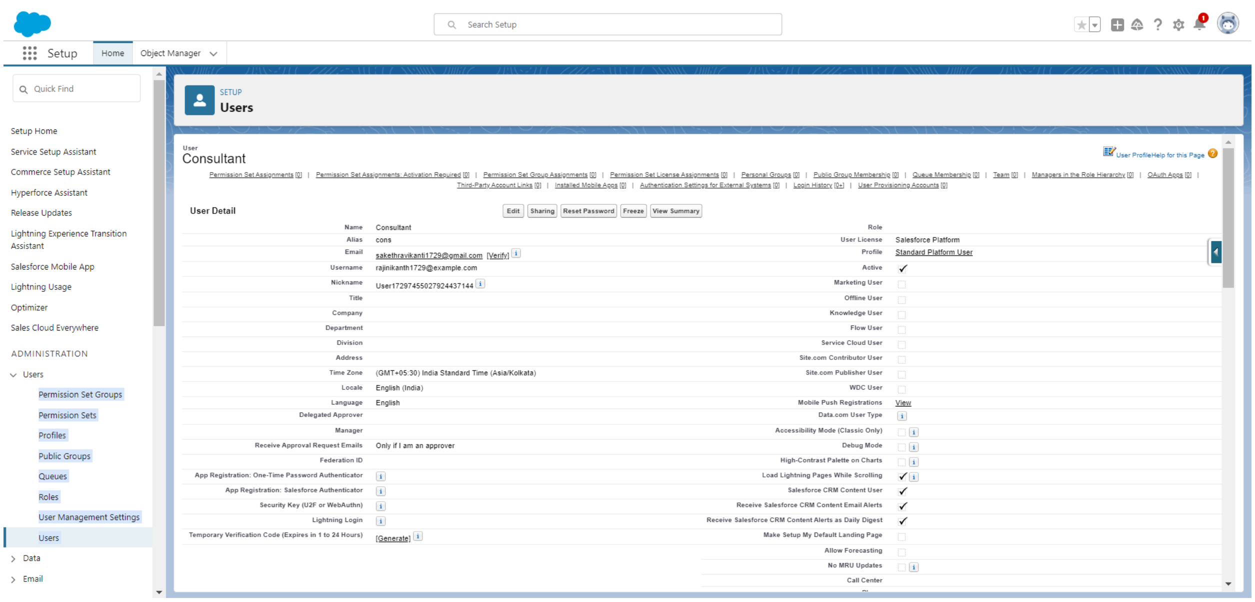
4. Fill in Required Information:

- Complete all the mandatory fields necessary for user creation. This may include first name, email, username, and other relevant details.

5. Save the User:

- Once all required fields are filled in, click **Save** to create the new user.

By following these steps, you will successfully add a new user with the specified details in Salesforce.



4.2 Configure the User Settings

1. Access User Setup:

- Navigate to **Setup** in Salesforce.
- Under the **Administration** section, click on **Users**.

2. Edit Your User Profile:

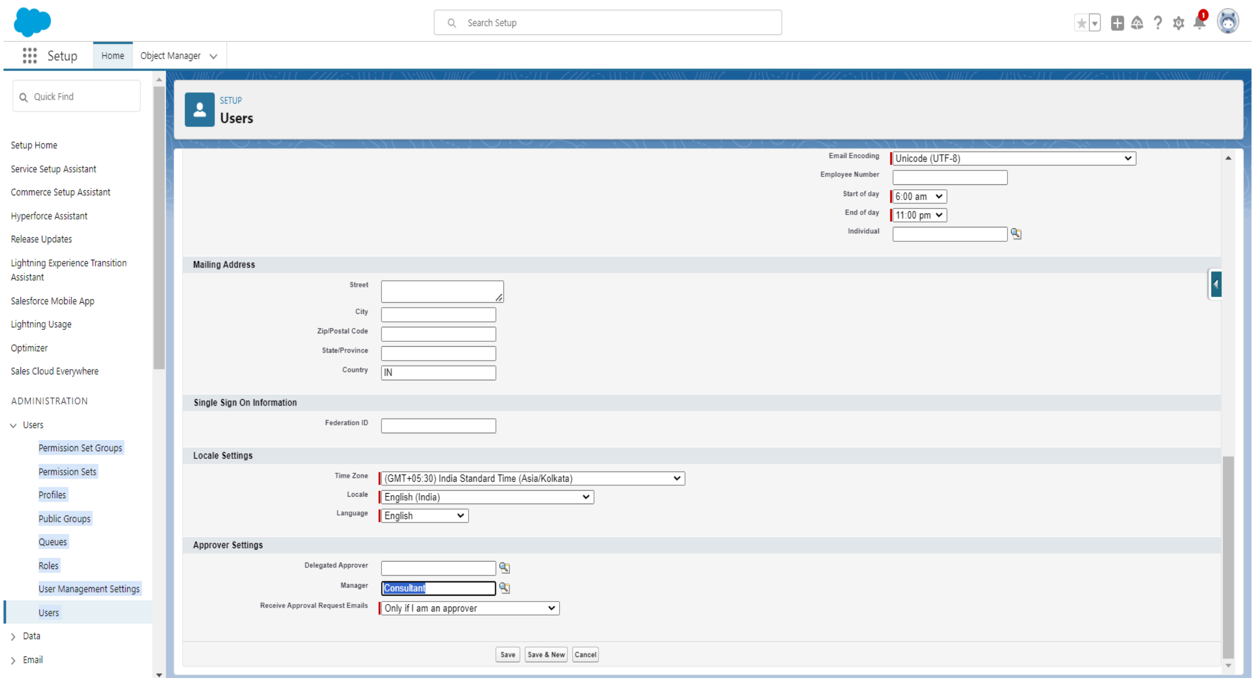
- Find your user profile in the list and click **Edit** next to your name to modify the settings.

3. Update Approver Settings:

- Scroll down to the bottom of the page until you reach the **Approver Settings** section.
- In the **Manager** field, select **Consultant** from the dropdown menu.

4. Save Changes:

- After making the changes, click **Save** to update your user profile with the new manager setting.



5.Create an Approval Process for Property Object

5.1 Create an Email Template

1. Enable Lightning Email Templates:

- Go to **Setup** in Salesforce.
- In the **Quick Find** box, type **Templates** and select **Lightning Email Templates**.
- Toggle the feature **on** to enable it.

2. Create a New Folder for Email Templates:

- Open the **App Launcher** and search for **Email Templates**.
- Click to access the Email Templates page.
- Create a new folder by clicking **New Folder** and enter your desired name for the folder.

3. Create the Submission Email Template:

- Inside the folder you just created, click on **New Email Template**.
- In the template editor, enter the following details:
    - **Template Name**: "Submission Template"
    - **HTML Value**: Paste the following text:

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

- Click **Save** to store your email template.

4. Create Approval Email Template:

- Repeat the previous steps to create another email template.
- Enter similar details as the Submission Template but customize the content for the approval notification. For example:

Subject: Approval of Your Request

Dear {{{Appointment__c.Student_Name__c}}},

We are pleased to inform you that your appointment request has been approved.

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}}}

Thank you for your patience, and we look forward to our meeting.

Best regards,

{{{Recipient.Name}}},

EduConsultantPro

5. Create Rejection Email Template:

- Similarly, create a third email template for rejection notifications.
- Customize the content for the rejection message, such as:

Subject: Update on Your Request

Dear {{{Appointment__c.Student_Name__c}}},

Thank you for your request regarding your appointment. Unfortunately, we are unable to proceed with your appointment at this time.

We appreciate your understanding and encourage you to reach out if you have any questions or need assistance.

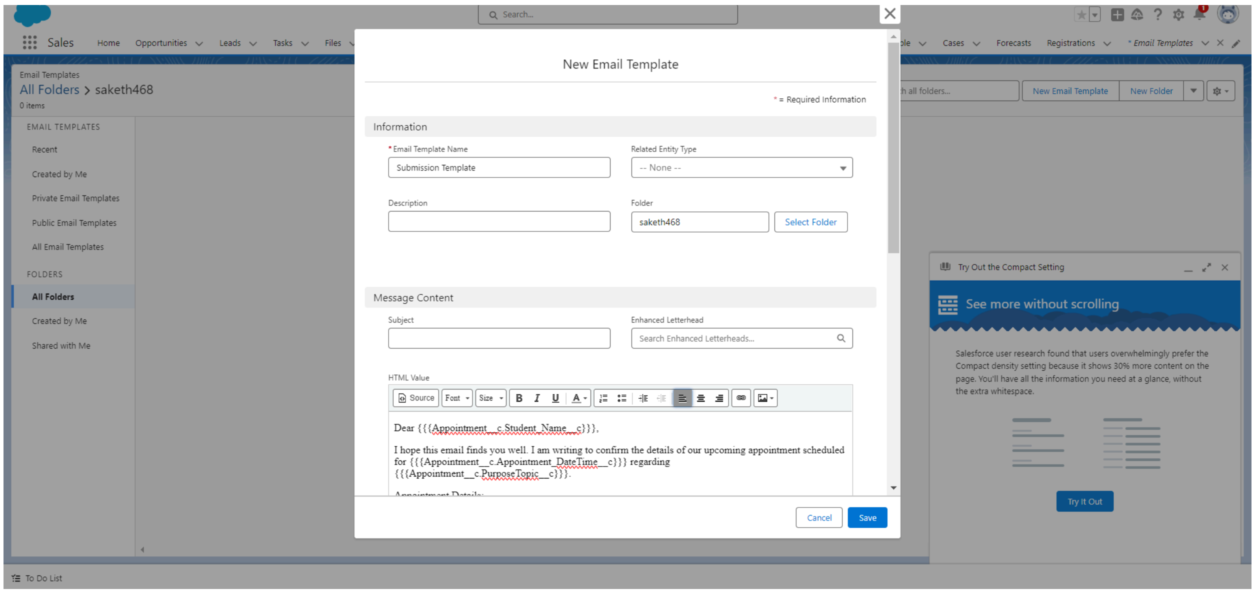
Best regards,

{{{Recipient.Name}}},

EduConsultantPro

6. Save Each Template:

- Ensure to save each template after entering the necessary details.



5.2 Create an Approval Process

1. Access Approval Processes:

- Navigate to **Setup** in Salesforce.
- In the **Quick Find** box, type **Approval** and select **Approval Processes**.

2. Manage Approval Processes:

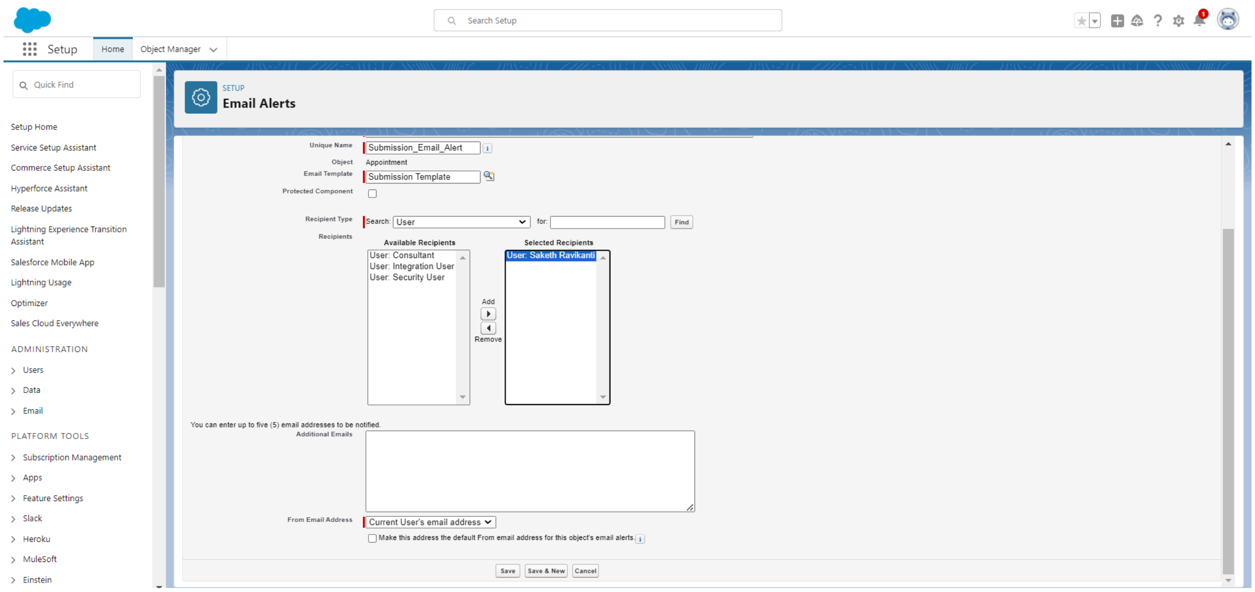
- In the **Manage Approval Processes For** section, choose **Appointment** from the dropdown menu.

3. Create a New Approval Process:

- Click on **Create New Approval Process**.
- Select **Use Jump Start Wizard** to begin configuring your approval process.

4. Configure the Approval Process:

- **Process Name**: Enter **Appointment Approval**.
- **Select Approver**: Choose **Manager** for the option labeled "Automatically assign an approver using a standard or custom hierarchy field."

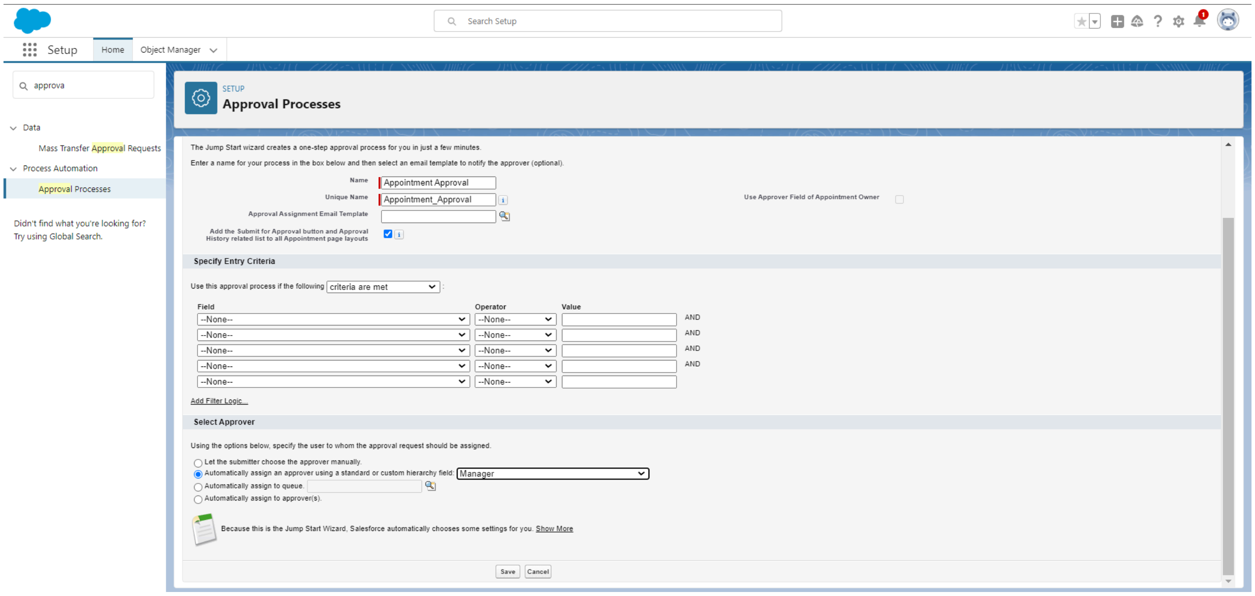


5. Set Approver Determination:

- Click **Next** and select **Next Automated Approver Determined By**.
- Choose **Manager** from the options available.

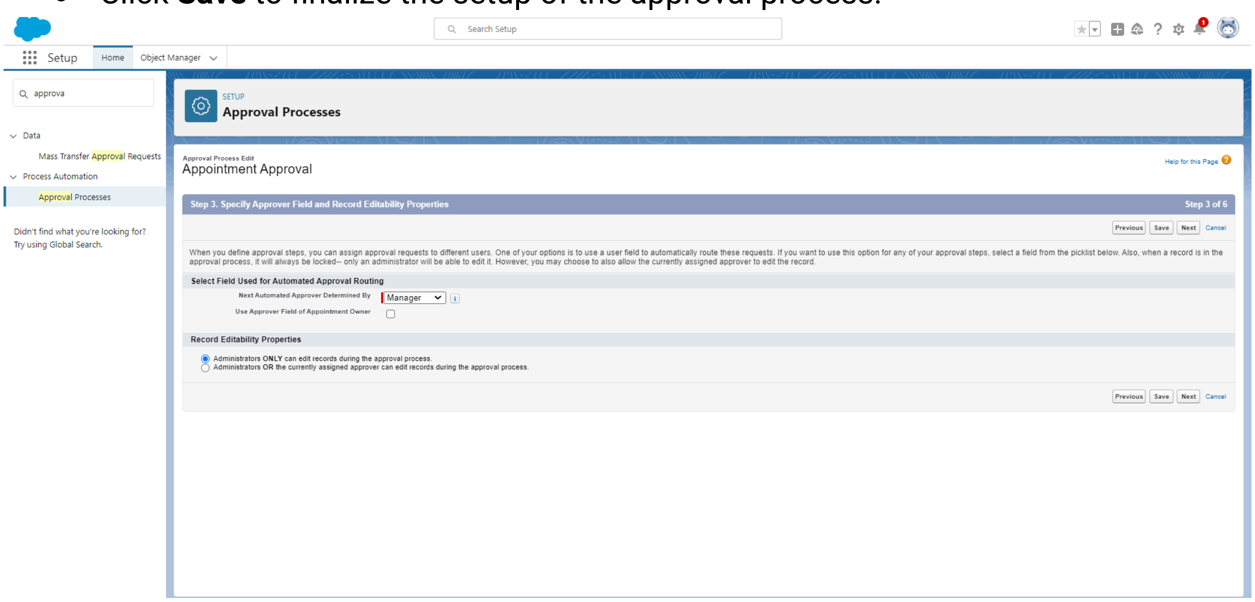
6. Configure Record Editability Properties:

- In the **Record Editability Properties** section, select **Administrators** or the currently assigned approver to allow them to edit records during the approval process.



7. Save the Approval Process:

- Click **Save** to finalize the setup of the approval process.



8. View Approval Process Detail Page:

- Click on **View Approval Process Detail Page** to proceed with further configurations.

9. Set Initial Submission Actions:

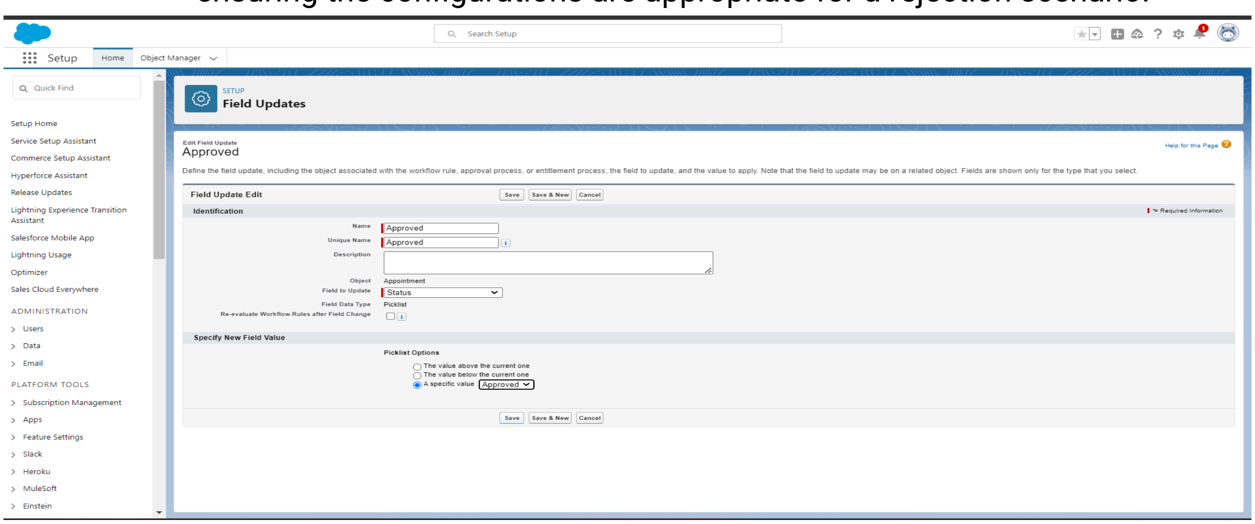
- Under the **Initial Submission Actions** section, click **Add New** and select **Field Update**.
- Configure the field update with the following details:
    - **Field**: Appointment: Status
    - **Value**: A Specific value
    - **Name**: Submitted
    - **Field to Update**: Appointment: Status
    - **Specific Value**: Pending

10. Add Email Alert for Submission:

- Click **Add New** again and select **Email Alert**.
- Configure the email alert with the following details:
    - **Description**: Submission Email Alert
    - **Unique Name**: This will auto-populate.
    - **Email Template**: Select **Submission Template**.
    - **Recipient Type**: Choose **Select your Name** (or the intended recipient).

11. Configure Final Approval and Final Rejection Actions:

- Repeat Steps 9 and 10 to set up actions for **Final Approval** and **Final Rejection**:
    - For **Final Approval**, create a **Field Update** and an **Email Alert** similar to the submission actions, adjusting the fields and values as needed.
    - For **Final Rejection**, also create a **Field Update** and an **Email Alert**, ensuring the configurations are appropriate for a rejection scenario.



6. Create a Record Triggered Flow

6.1 Configure the Start Element

1. Access Flows:

- Go to **Setup** in Salesforce.
- In the **Quick Find** box, type **Flows** and select **Flows** from the results.

2. Create a New Flow:

- Click on the **New Flow** button.

3. Select Flow Type:

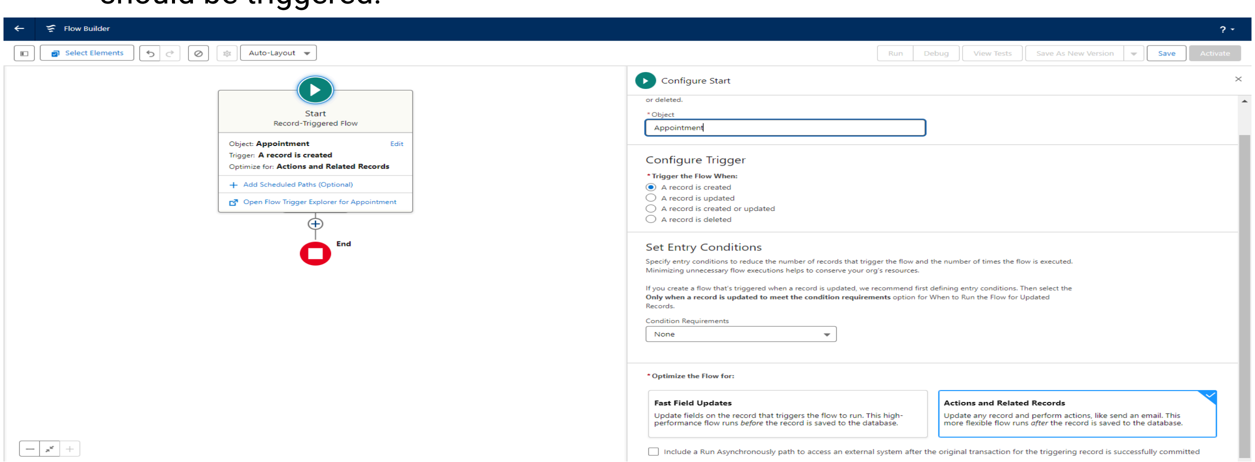
- Choose **Record-Triggered Flow** from the options presented.

4. Start the Flow:

- Click **Create** to proceed. This will open the **Configure Start** window.

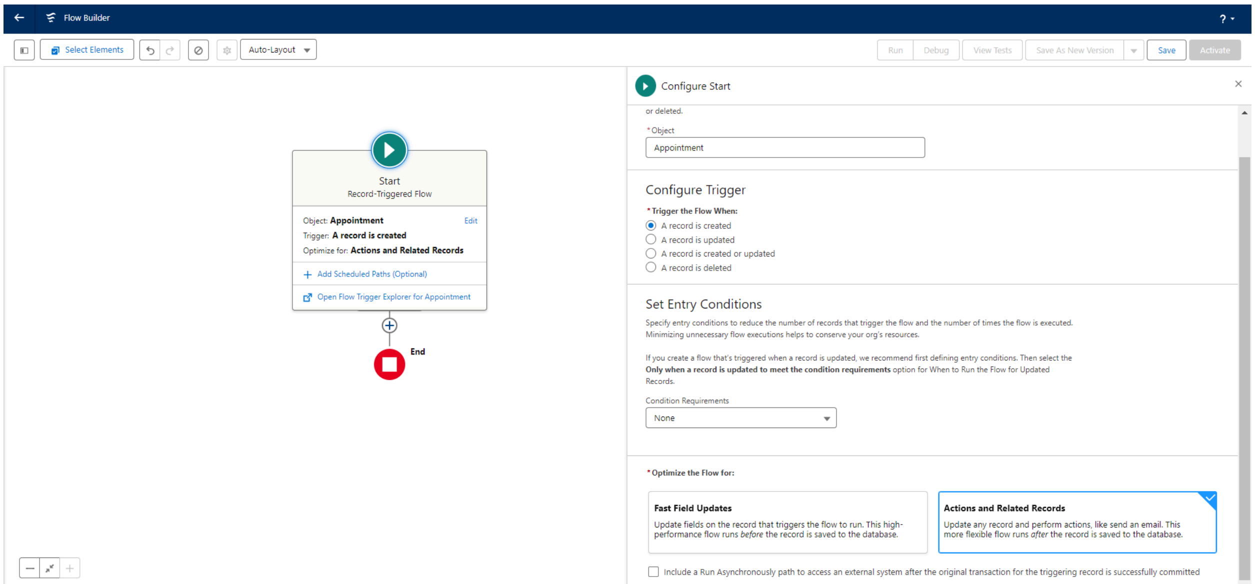
5. Configure Flow Settings:

- **Object**: Select **Appointment** from the dropdown menu.
- **Trigger the Flow When**: Choose **A record is created** to specify when the flow should be triggered.



6. Review Flow Structure:

- After configuring the start conditions, your flow will be set up to respond whenever a new appointment record is created.



6.2 Add an Action Element

1. Add Action Element:

- After the **Start Element**, click on the **+** icon to add a new element.
- Choose **Action** from the available options.

2. Configure the Action:

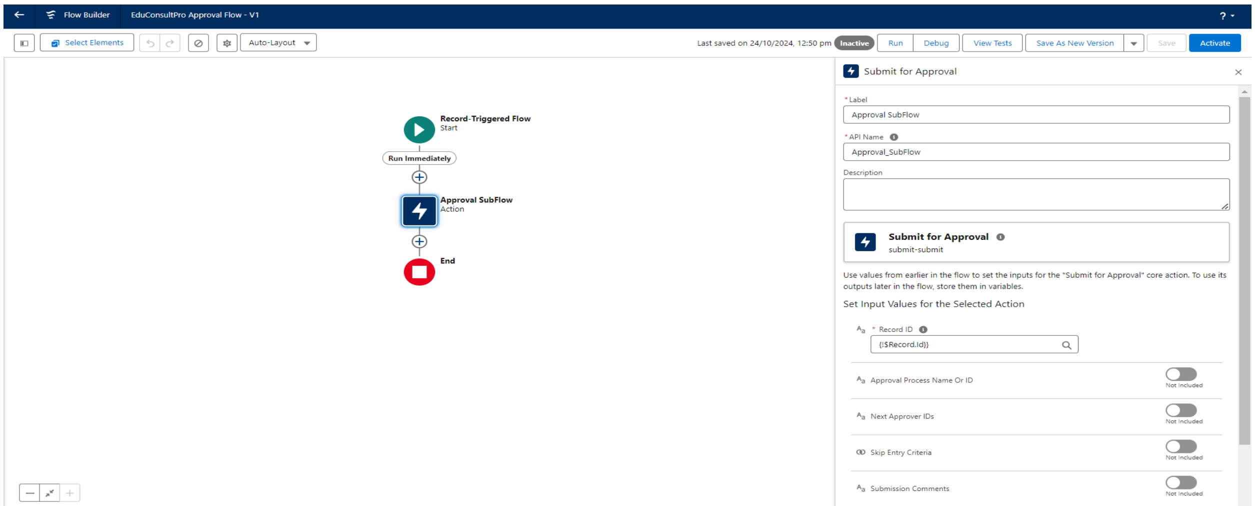
- Select **Submit for Approval** from the action types.
- Label this action as **"Approval SubFlow"**.

3. Set Record ID:

- For the **RecordId** field, set it to **"{!$Record.Id}"**. This ensures that the flow submits the current appointment record for approval.

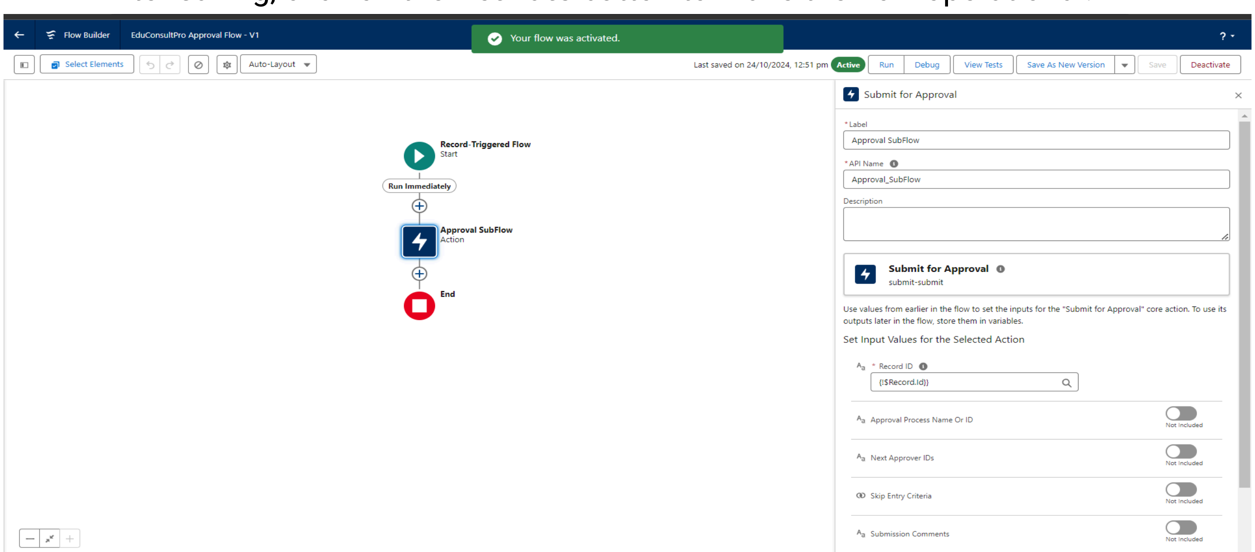
4. Save the Flow:

- Click on **Save** at the top right corner.
- Label the flow as **"EduConsultPro Approval Flow"**.



5. Activate the Flow:

- After saving, click on the **Activate** button to make the flow operational.



7. Create a ScreenFlow for Existing Student to Book an Appointment

7.1 Add Screen Element

1. Open Flow Builder:

- From **Setup**, type **Flow Builder** in the **Quick Find** box and select it.
- Click **New Flow** and choose **ScreenFlow**.

2. Add a Screen Element:

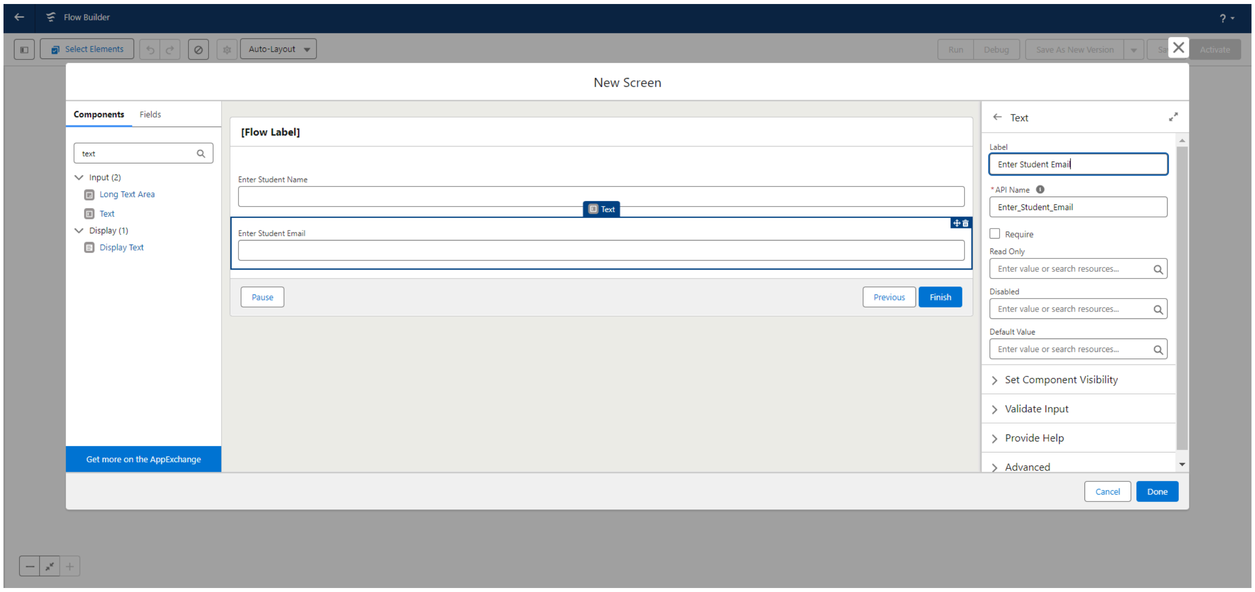
- In the flow canvas, click the **+** icon and select **Screen** from the list of options.
- In the **Screen Properties** pane, give it the **Label**: **“Get Student Info”**.

3. Add Text Components:

- From the left-side panel, under **Input**, drag and drop the **Text** component onto the screen.
    - **1st Text Component**:
        - In the **Label** field, enter "**Enter Student Name**".
    - **2nd Text Component**:
        - Drag another **Text** component.
        - In the **Label** field, enter "**Enter Student Email**".

4. Finalize the Screen:

- After adding both text components, click **Done** to save the screen element.



7.2 Add GET Record Element

1. Add a GET Record Element:

- After the **Decision Element** under the **IELTS** path, click the **+** icon and select **Get Records** from the list of elements.
- In the **Label** field, enter **"Get Rec"**.

2. Configure the GET Record Element:

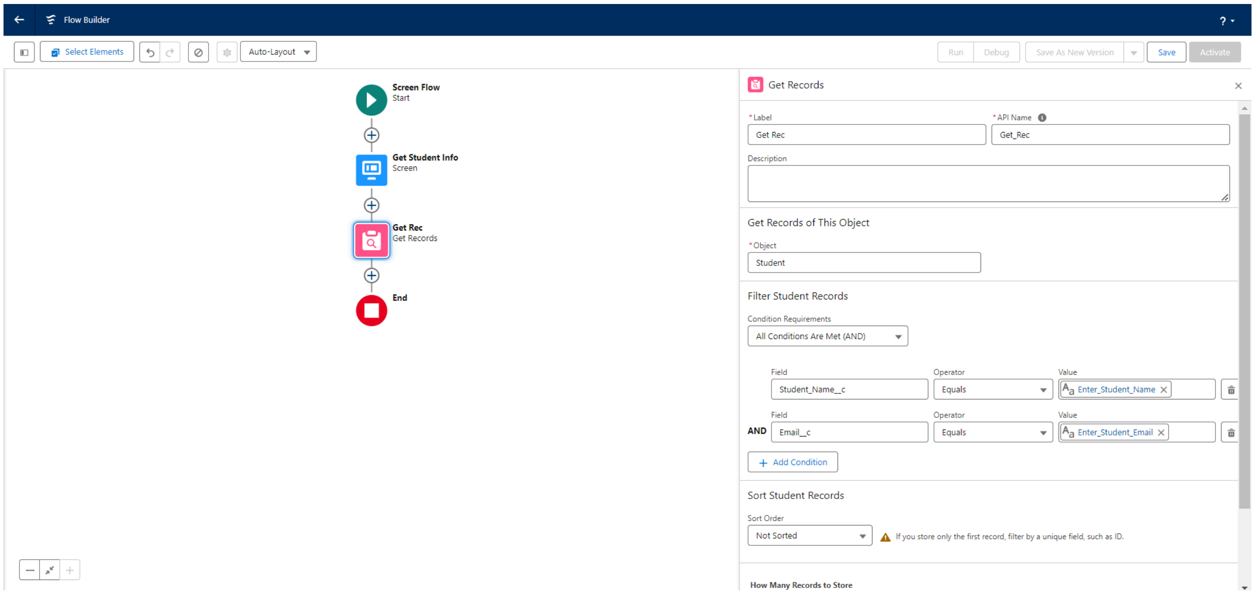
- **Select Object**: Choose **Student** from the dropdown list of objects.
- **Condition Requirement**: Select **All Conditions are Met (AND)** to ensure multiple conditions are checked.

3. Set the Field Conditions:

- **Field**: Select **Student Name**.
  - **Operator**: Choose **Equals**.
  - **Value**: Enter **{!Enter_Student_Name}** (this is the value from the screen input field).
- **Field**: Select **Email__c**.
  - **Operator**: Choose **Equals**.
  - **Value**: Enter **{!Enter_Student_Email}** (this is the value from the screen input field).

4. Save the GET Record Element:

- After setting the conditions, click **Done** to save.



7.3 Add Decision Element

1. Add a Decision Element:

- After the **Select Display Student Details** element, click the **+** icon to add a new element.
- Select **Decision** from the list.
- In the **Label** field, enter **"Appointment or Case"**.

2. Configure the Outcome for Appointment:

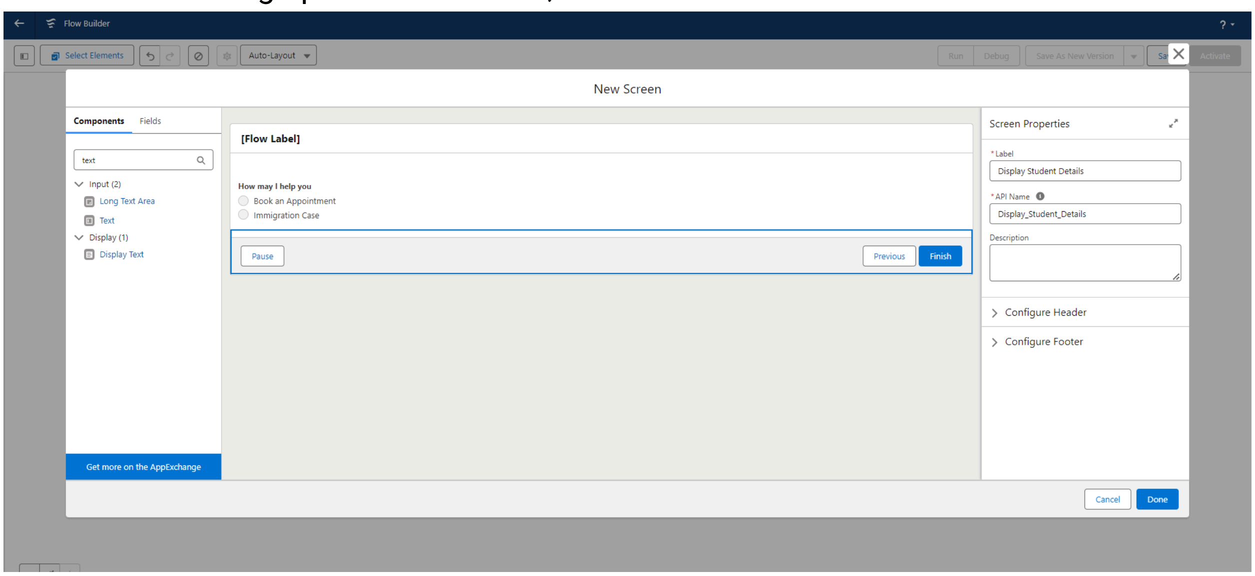
- Under the **Outcome** section, label the outcome as **"Appointment"**.
- Set the condition for **Appointment** as follows:
  - **Resource**: Choose **{!How_may_I_Help_you}** (the variable that holds the user's choice).
  - **Operator**: Set it to **Equals**.
  - **Value**: Enter **{!Book_an_Appointment}** (this should be the choice related to booking an appointment).

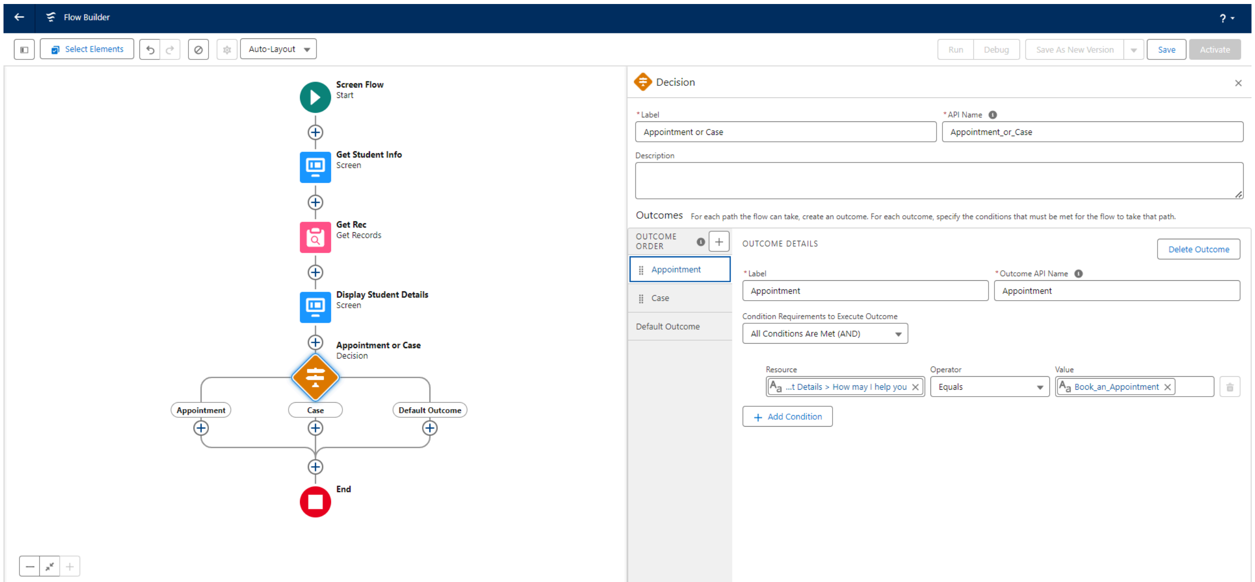
3. Configure the Outcome for Case:

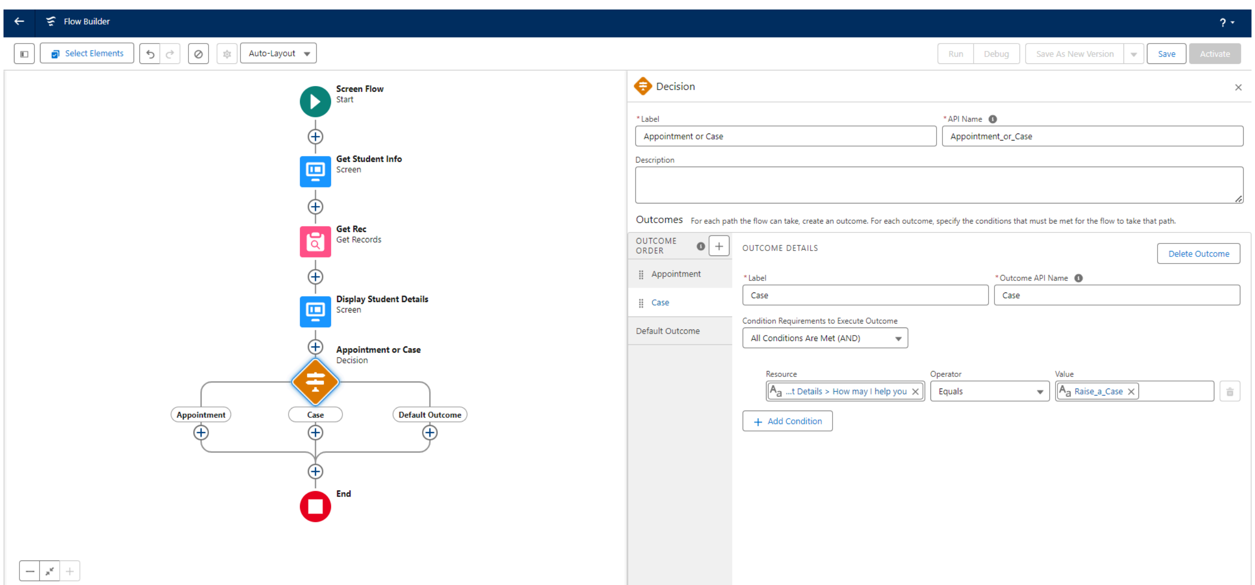
- Click the "**+**" icon to add another outcome.
- Label this outcome as "**Case**".
- Set the condition for **Case** as follows:
  - **Resource**: Choose **{!How_may_I_Help_you}** (same resource as above).
  - **Operator**: Set it to **Equals**.
  - **Value**: Enter the corresponding value for **Case** (e.g., **{!File_a_Case}**).

4. Save the Decision Element:

- After setting up both conditions, click **Done**.







7.4 Add Screen Element

1. Add a Screen Element:

- After the **Decision Element** (under the **Appointment** path), click the **+** icon to add a new element.
- Select **Screen** from the list.
- In the **Label** field, enter **"Appointment Booking Screen"**.

2. Create a New Resource for Appointment Fields:

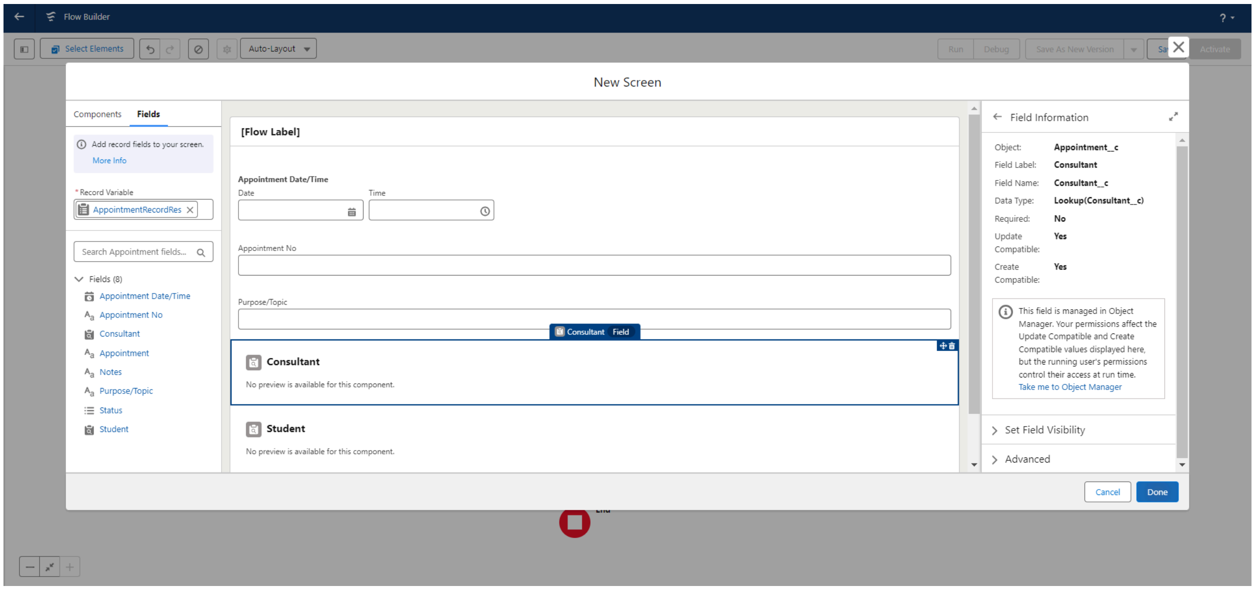
- In the **Screen Properties** pane, click on **Fields** on the left side panel.
- Under the **Record Variable Input**, click **Create New Resource**.
    - Choose **Variable** as the resource type.
    - For **API Name**, enter "**AppointmentRecordRes**".
    - Select **Record** as the type and choose **Appointment** as the object.
    - This resource will store all the fields from the **Appointment** object.

3. Add Fields to the Screen:

- Now, drag and drop the required fields from the **AppointmentRecordRes** resource to the screen.
    - Common fields could include:
        - **Student Name**
        - **Appointment Date**
        - **Consultant Name**
        - **Purpose of Appointment**
        - **Email**
- These fields will be displayed on the screen to collect the necessary appointment details from the user.

4. Finalize and Save the Screen:

- Once you have added the necessary fields, click **Done** to save the **Appointment Booking Screen**.



7.5 Add GET Record Element

1. Add a GET Record Element:

- After the **Decision Element** (under the **Appointment** path), click the **+** icon to add a new element.
- Select **Get Records** from the list.
- In the **Label** field, enter **"Get Consultant Rec"**.

2. Configure the GET Record Element:

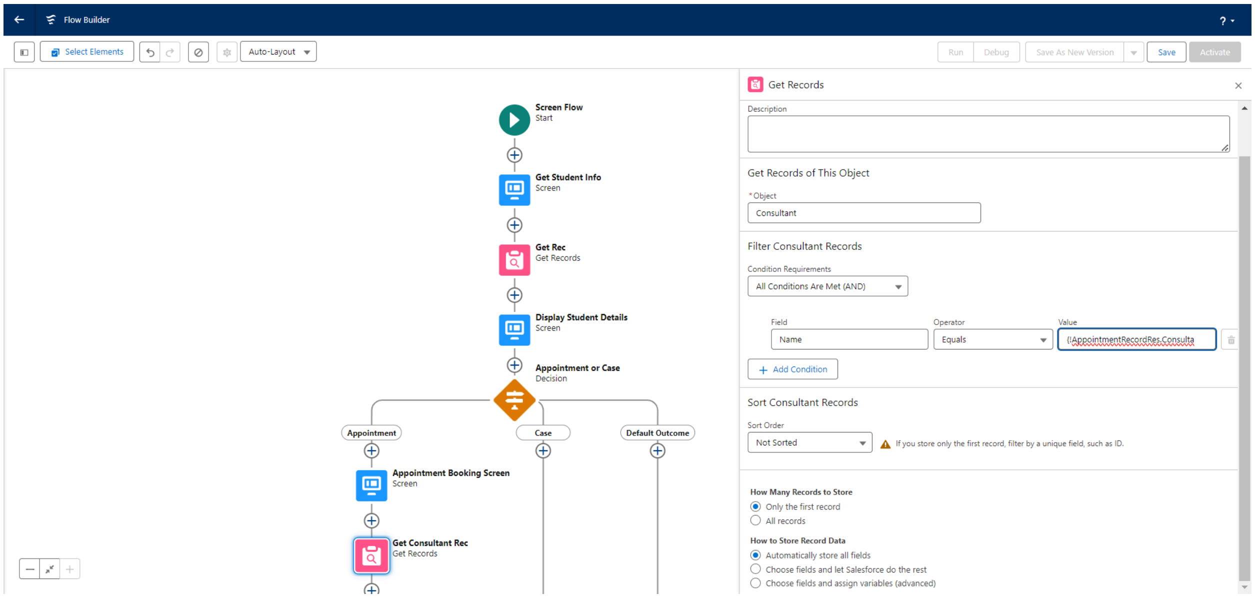
- Under **Object**, select **Consultant** as the object you want to retrieve records from.
- For **Condition Requirements**, select **All Conditions Are Met (AND)**.

3. Define the Conditions:

- **Field**: Select **Name** (this field refers to the Consultant's name in the Consultant object).
- **Operator**: Choose **Equals**.
- **Value**: Enter **{!AppointmentRecordRes.Consultant_Name__c}**.
  - This value pulls the Consultant's name from the **AppointmentRecordRes** resource, which was collected in the previous screen.

4. Save the GET Record Element:

- Once the conditions are set, click **Done** to save the **Get Consultant Rec** element.



7.6 Create Appointment Record using Create Records Element

1. Add a Create Element:

- After the **Get Consultant Rec** element, click the **+** icon to add a new element.
- Select **Create Records** from the list.
- Label the element as **"Create Appointment"**.

2. Configure the Create Element:

- Under **How many records to create**, select **One**.
- Under **How to set the record fields**, choose **Use separate resources, and literal values**.

3. Select the Object:

- For the **Object**, choose **Appointment**.

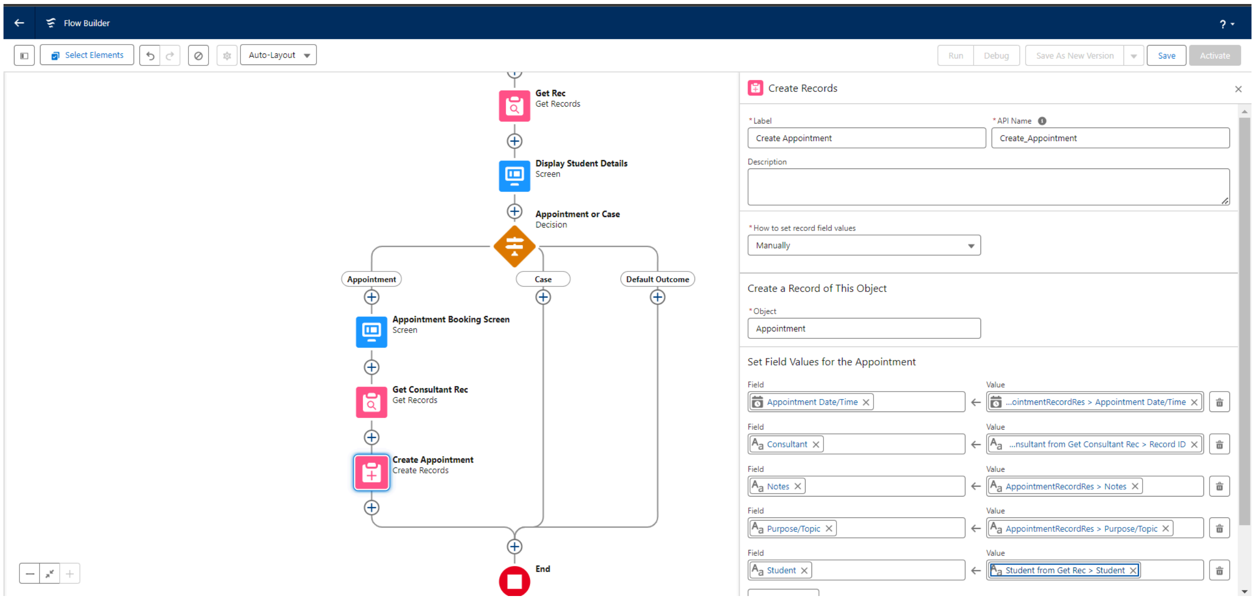
4. Define the Fields and Values:

Add the following fields and their respective values to populate the appointment record:

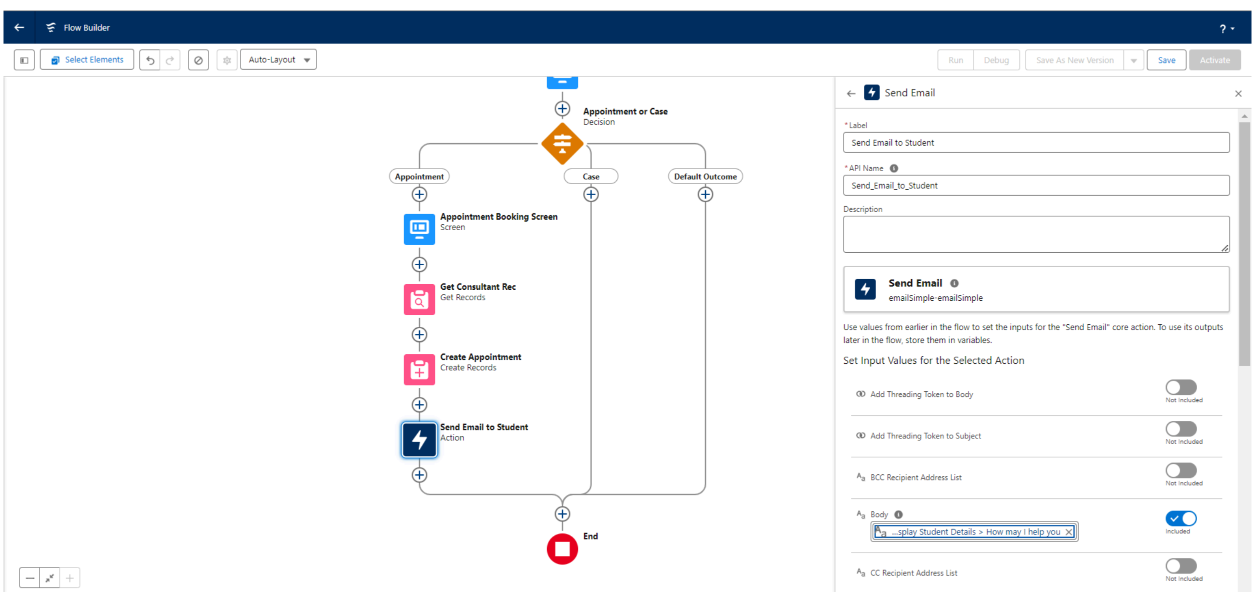
- **Field**: **Appointment_DateTime__c**
  - **Value**: **{!AppointmentRecordRes.Appointment_DateTime__c}**
    (This pulls the appointment date and time from the record created during the previous screen.)
- **Field**: **Consultant__c**
  - **Value**: **{!Get_Consultant_Rec.Id}**
    (This pulls the consultant's ID from the **Get Consultant Rec** element.)
- **Field**: **Notes__c**
  - **Value**: **{!AppointmentRecordRes.Notes__c}**
    (This retrieves any additional notes from the appointment form.)
- **Field**: **PurposeTopic__c**
  - **Value**: **{!AppointmentRecordRes.PurposeTopic__c}**
    (This records the topic or purpose of the appointment.)
- **Field**: **Student_Name__c**
  - **Value**: **{!Get_Rec.Id}**
    (This associates the appointment with the student record obtained earlier.)

5. Save the Create Element:

- Once all the fields and values are set, click **Done** to save the **Create Appointment** element.



7.7 Add 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 of available elements.

- Label the screen as "**Confirmation Screen**".

2. Add Display Text Component:

- On the **left side panel**, search for the **Display Text** component.
- Drag the **Display Text** component to the main panel.
- Label the display text as "**Appointment_Confirmation**".

3. Add Confirmation Details:

- In the **Resource Picker** box, paste the following details to display the confirmation message:

Consultant Name : {!Get_Consultant_Rec.Name},

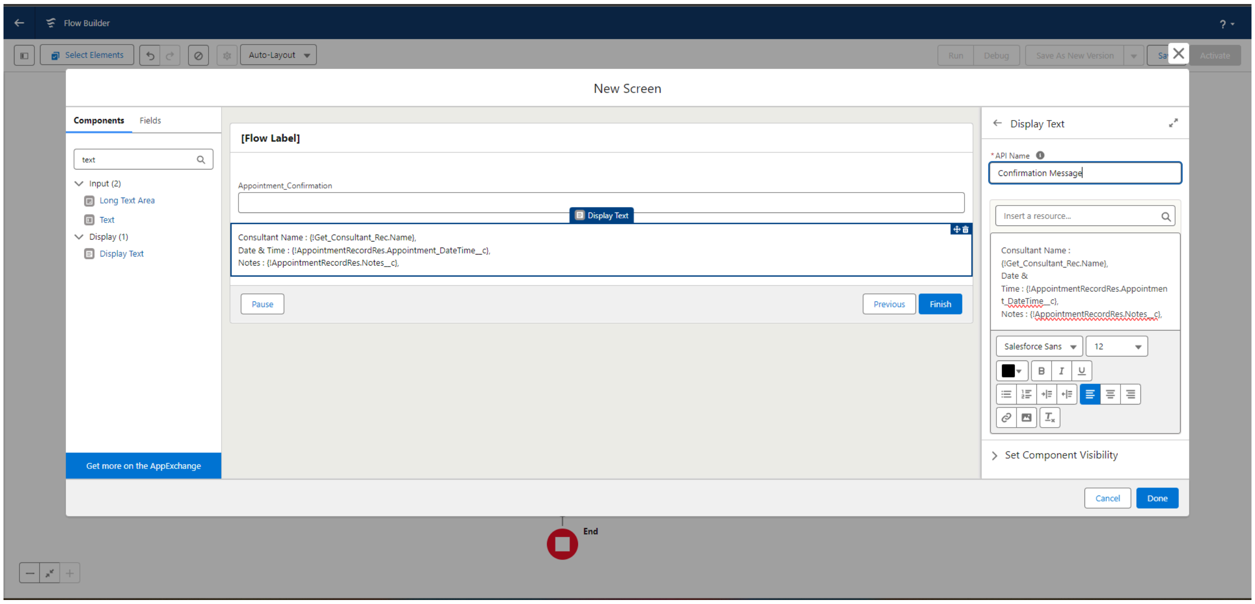
Date & Time : {!AppointmentRecordRes.Appointment_DateTime__c},

Notes : {!AppointmentRecordRes.Notes__c},

  - **Consultant Name**: Displays the name of the consultant from the **Get Consultant Rec** element.
  - **Date & Time**: Shows the appointment's date and time as provided in the appointment form.
  - **Notes**: Includes any additional notes entered during the appointment scheduling.

4. Complete the Screen Setup:

- Once the text has been added, click **Done** to save the **Confirmation Screen**.



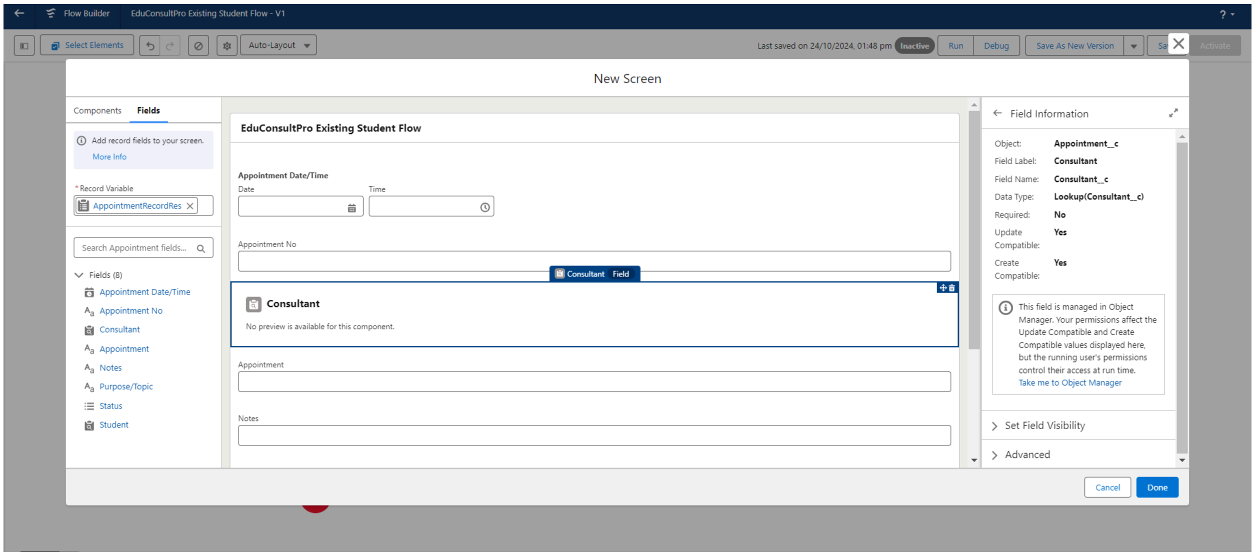
7.8 Add an SubFlow Element

1. Add Subflow Element:

- After the **Decision Element** (on the **Case** path), click the **+** icon to add a new element.
- Select **Subflow** from the list of available elements.

2. Select "Create a Case" Flow:

- In the subflow configuration, search for the flow called "**Create a Case**".
- Once found, select it.

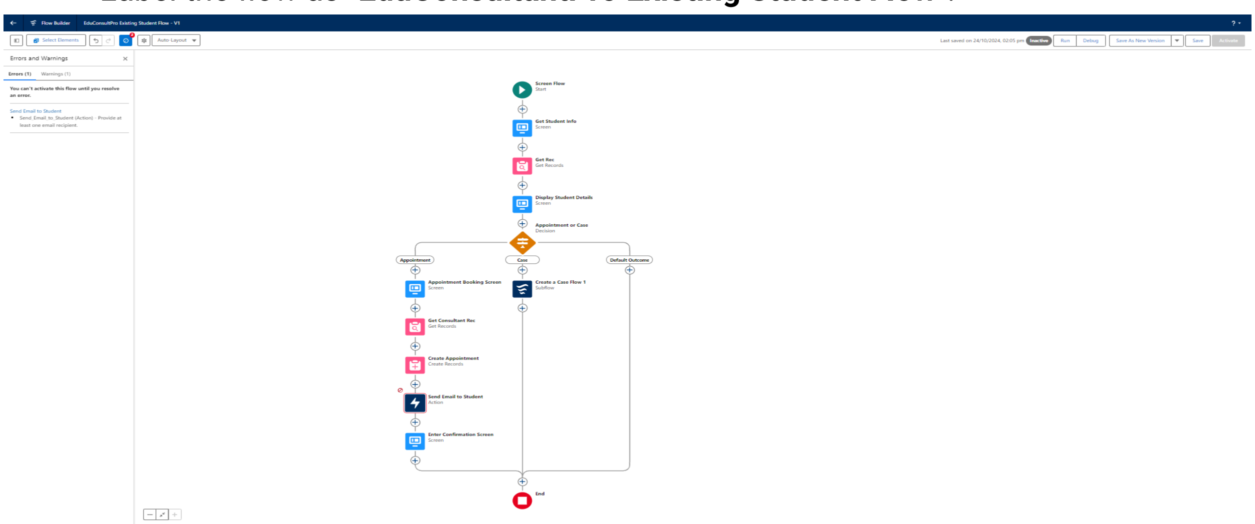


3. Label the Subflow:

- Label the subflow as "**Create Student Case**".

4. Save the Flow:

- After configuring the subflow, click **Save**.
- Label the flow as "**EduConsultantPro Existing Student Flow**".



5. Reference:

- Use the image reference provided to visualize how the flow looks with the subflow element for the **Case** path.

8. Create a ScreenFlow to Combine all the flows at one place

8.1 Add Screen Element

1. Add Screen Element:

- In **Flow Builder**, click the **+** icon to add a new element.
- Select **Screen** from the available options.

2. Label the Screen:

- In the **Screen Properties** pane, enter the label as "**Welcome Screen**".

3. Add Display Text Component:

- On the left side panel, search for the **Display Text** component.
- Drag the **Display Text** component into the main panel.

4. Label the Display Text:

- Label the display text as "**SuccessMessage**".

5. Paste Welcome Message:

- In the **Resource Picker** box, paste the following text:

“Welcome to EduConsultantPro

your premier destination for education and immigration solutions!

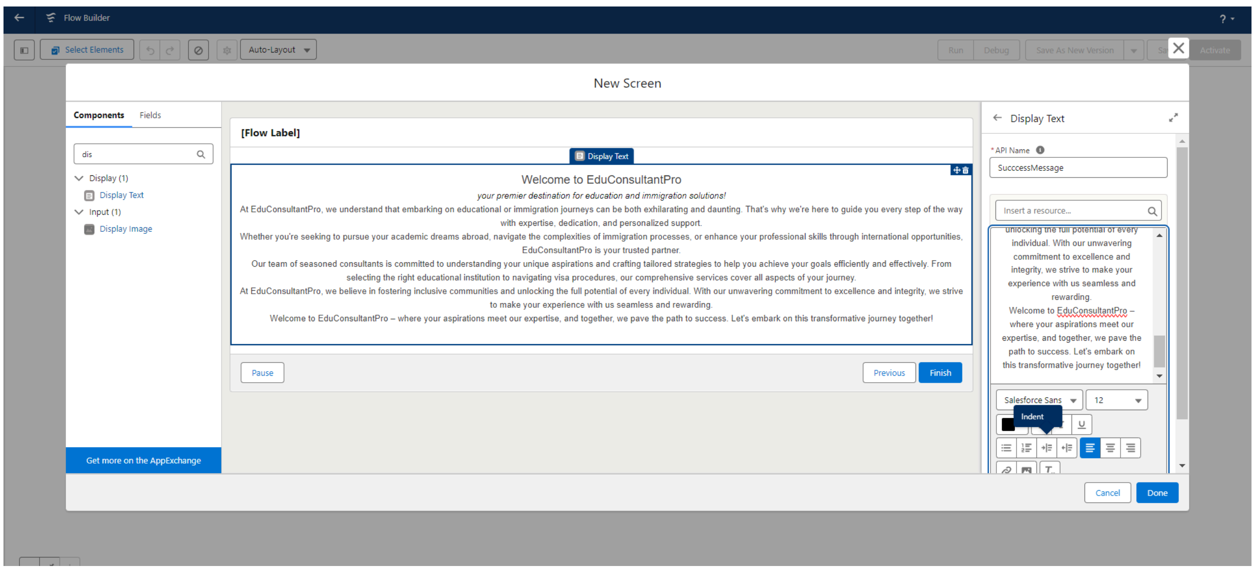
At EduConsultantPro, we understand that embarking on educational or immigration journeys can be both exhilarating and daunting. That's why we're here to guide you every step of the way with expertise, dedication, and personalized support.

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!”



8.2 Add Screen Element

Steps to Add "Existing or New Student Confirmation Screen" Element:

1. Add Screen Element:

- In **Flow Builder**, click the **+** icon to add a new element.
- Select **Screen** from the available options.

2. Label the Screen:

- In the **Screen Properties** pane, enter the label as **"Existing or New Student Confirmation Screen"**.

3. Add Radio Button Component:

- From the left side panel, search for the **Radio Button** component.
- Drag the **Radio Button** component into the main panel.

4. Label the Radio Button:

- In the **Radio Button Properties** pane, set the label to **"Are you an Existing Student?"**.

5. Add Yes Choice:

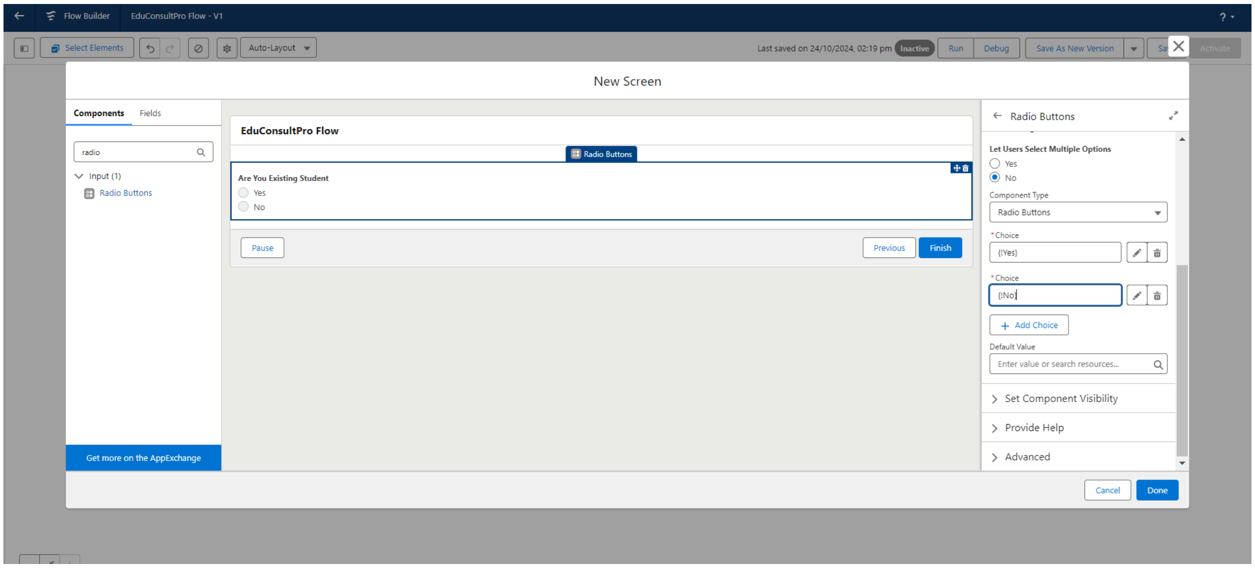
- Under the **Choices** section, click **Add Choice**.
- In the input field, type **"Yes"**.
- Click **Create** to generate the **Yes** choice.

6. Add No Choice:

- Repeat step 5.
- Type **"No"** in the input field to create the **No** choice.
- Click **Create** to generate the **No** choice.

7. Click Done:

- Once both the **Yes** and **No** choices are created, click **Done** to complete the configuration of the **Existing or New Student Confirmation Screen** element.



8.3 Add Decision Element

1. Add Decision Element:

- In **Flow Builder**, click the **+** icon after the **Existing or New Student Confirmation Screen** element.
- Select **Decision** from the available options.

2. Label the Decision:

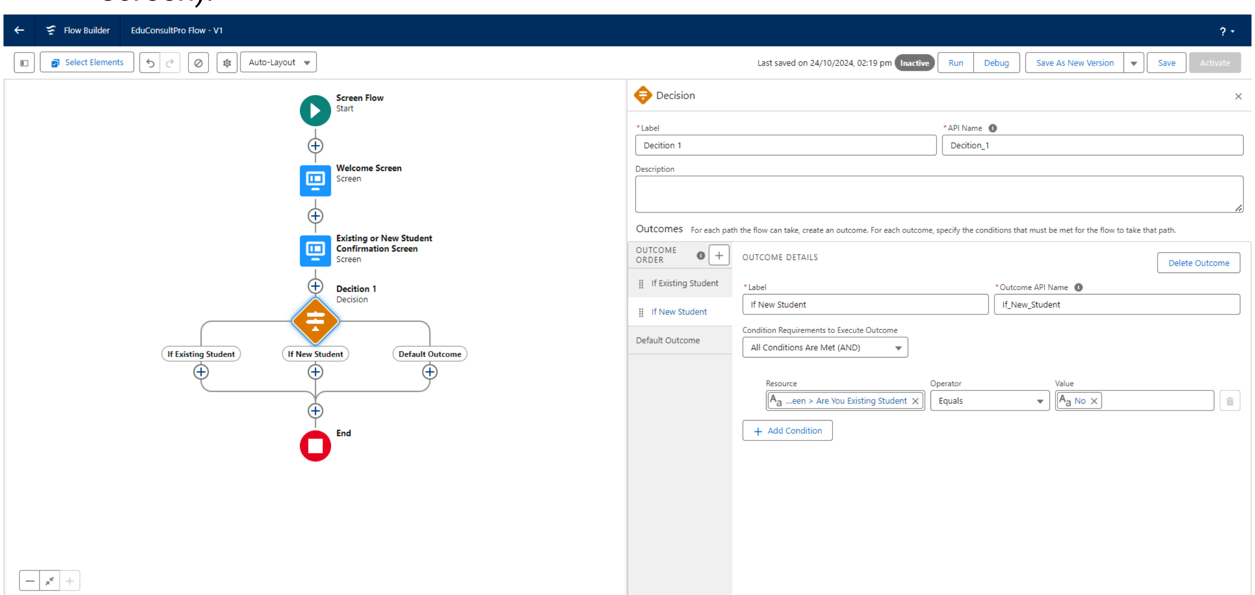
- In the **Decision Properties** pane, enter the label as **"Decision 1"**.

3. Create Outcome for "If Existing Student":

- Under the **Outcomes** section, click **Add Outcome**.
- Label it as **"If Existing Student"**.

4. Set the Condition for "If Existing Student":

- For **Resource**, select the radio button component **{!Are_you_a_Existing_Student}** from the **Existing or New Student Confirmation Screen** element.
- For **Operator**, select **Equals**.
- For **Value**, select **Yes** (the choice variable you created in the confirmation screen).



5. Add Outcome for "If New Student":

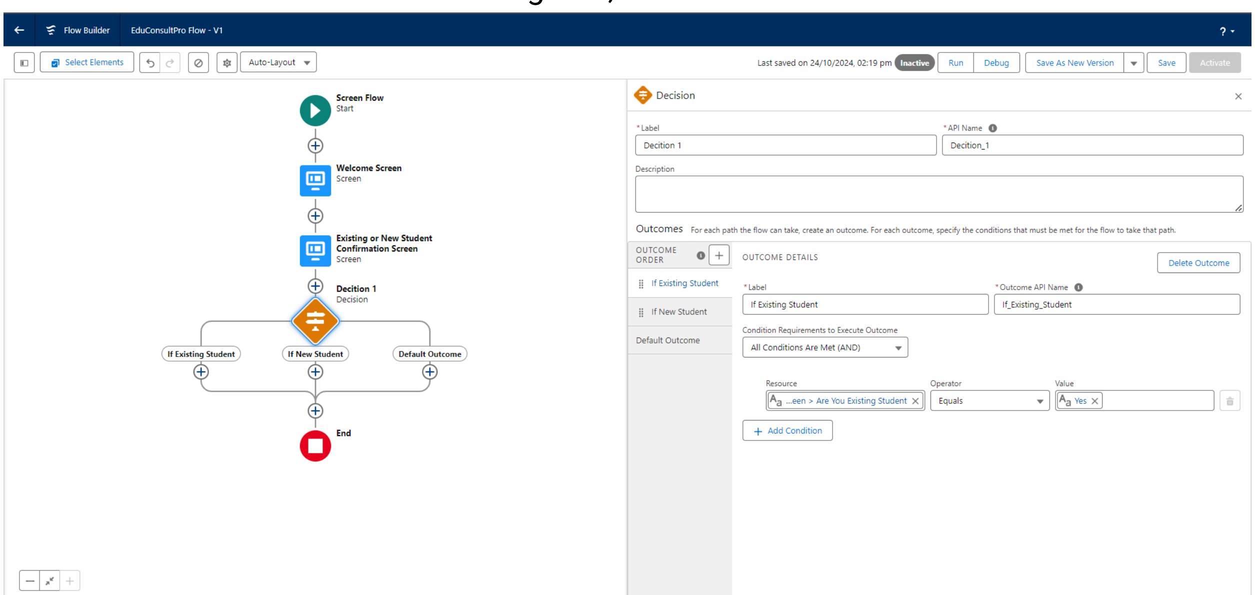
- Click the **+** icon under **Outcomes** to add a new outcome.
- Label the new outcome as **"If New Student"**.

6. Set the Condition for "If New Student":

- For **Resource**, select the radio button component **{!Are_you_a_Existing_Student}**.
- For **Operator**, select **Equals**.
- For **Value**, select **No** (the choice variable for new students).

7. Click Done:

- Once both outcomes are configured, click **Done** to save the **Decision 1** element.



8.4 Add an SubFlow Element

1. Add Subflow Element:

- In **Flow Builder**, click the **+** icon after the **Decision 1** element on the **"If Existing Student"** path.
- Select **Subflow** from the options.

2. Select Subflow:

- In the **Subflow Properties** pane, search for the flow named "**EduConsultantPro Existing Student Flow**".
- Select "**EduConsultantPro Existing Student Flow**" from the search results.

3. Label the Subflow:

- In the **Label** field, enter "**Existing Student Flow**" to clearly identify this subflow.

4. Save the Flow:

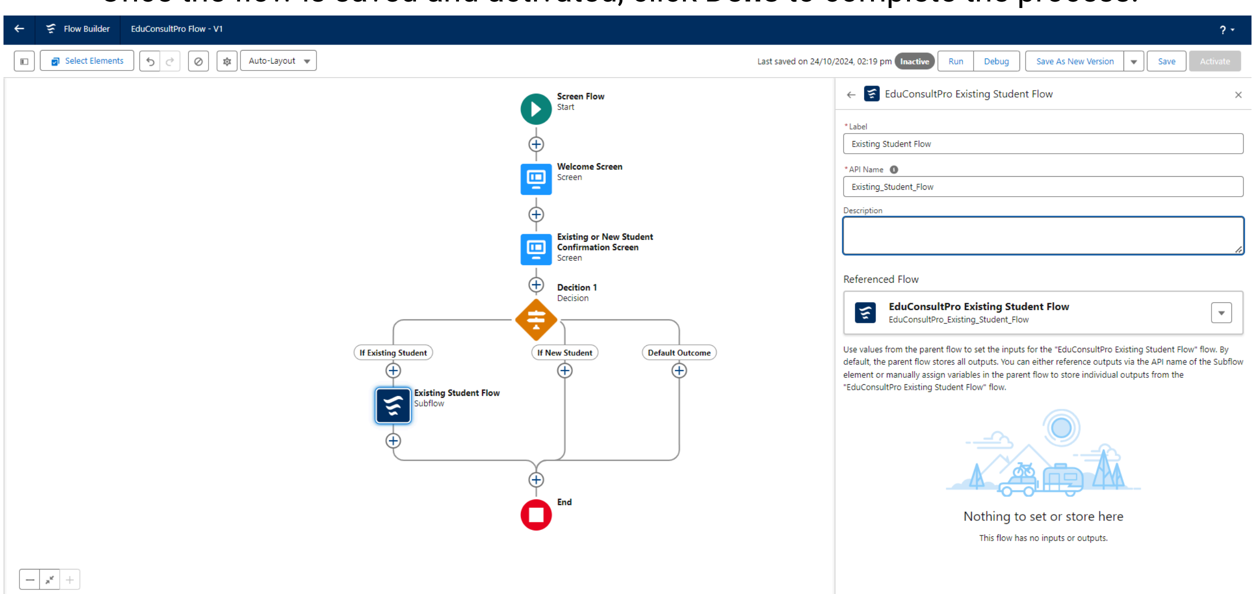
- Click **Save** at the top right of the Flow Builder screen.
- In the **Flow Label** field, name the flow "**EduConsultantPro Existing Student Flow**".

5. Activate the Flow:

- After saving, click **Activate** to make the flow operational.

6. Click Done:

- Once the flow is saved and activated, click **Done** to complete the process.



8.5 Add an SubFlow Element

1. Add Subflow Element:

- In **Flow Builder**, click the **+** icon after the **Decision 1** element on the **"If Not an Existing Student"** path.
- Select **Subflow** from the options.

2. Select Subflow:

- In the **Subflow Properties** pane, search for the flow named **"EduConsultantPro Student Flow"**.
- Select **"EduConsultantPro Student Flow"** from the search results.

3. Label the Subflow:

- In the **Label** field, enter **"New Student Flow"** to clearly identify the flow for new students.

4. Save the Flow:

- Click **Save** at the top right of the Flow Builder screen.
- In the **Flow Label** field, name the flow **"EduConsultantPro Existing Student Flow"**.

5. Click Done:

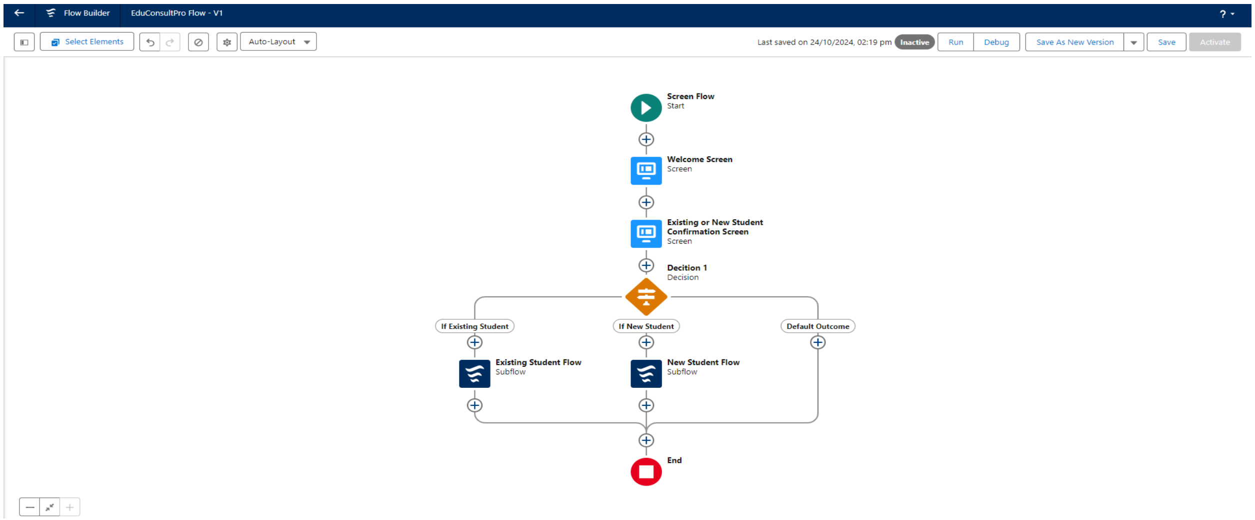
- After saving the subflow and setting the label, click **Done** to confirm and close the subflow element.

6. Final Save and Label:

- Now, click **Save** again at the top right of the Flow Builder screen.
- For the overall flow label, name it **"EduConsultPro Flow"**.

7. Activate the Flow:

- After saving, click **Activate** to make the flow live and operational.



9. Create a lightning app page

1. Open Lightning App Builder:

- From **Setup**, enter **App Builder** in the Quick Find box.
- Select **Lightning App Builder** from the results.

2. Create a New Home Page:

- Click **New** and choose **Home Page** as the type.
- Click **Next**.

3. Name and Select Template:

- Name the page **"EduConsultPro Home Page"**.
- Choose the **Standard Home Page** template.
- Click **Done**.

4. Add Flow Component:

- In the page layout, drag the **Flow Component** from the components panel.
- Drop the Flow component into the top-right region of the layout.

5. Select EduConsultPro Flow:

- Search for "**EduConsultantPro Flow**" in the flow selection box.
- Select it and click **Save**.

6. Activate the Page:

- Click **Activate** to make the page available.

7. Assign to App and Profiles:

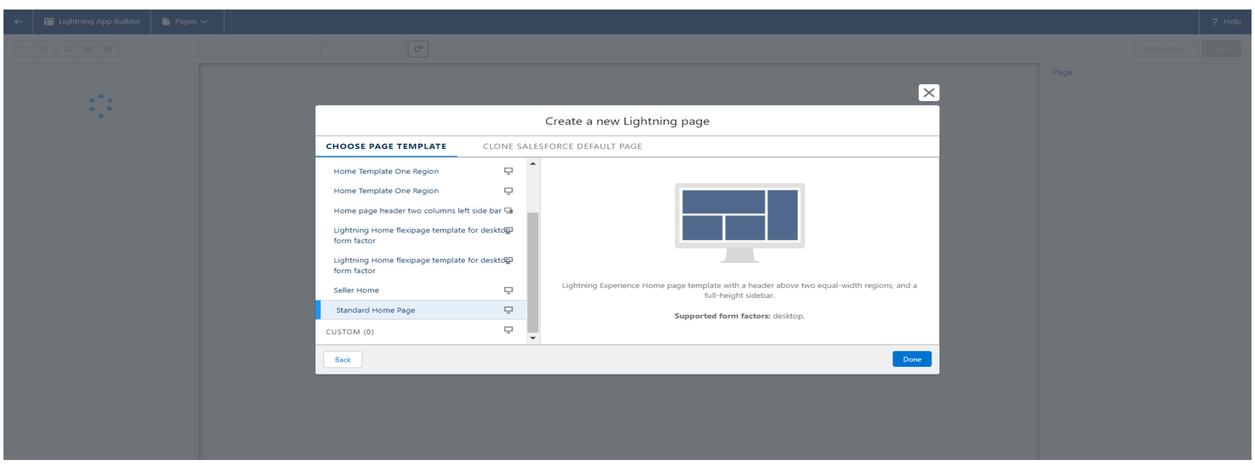
- Choose **App and Profile** for activation.
- Click **Assign to Apps and Profiles**.

8. Assign to Sales App:

- Select the **Sales** app and click **Next**.

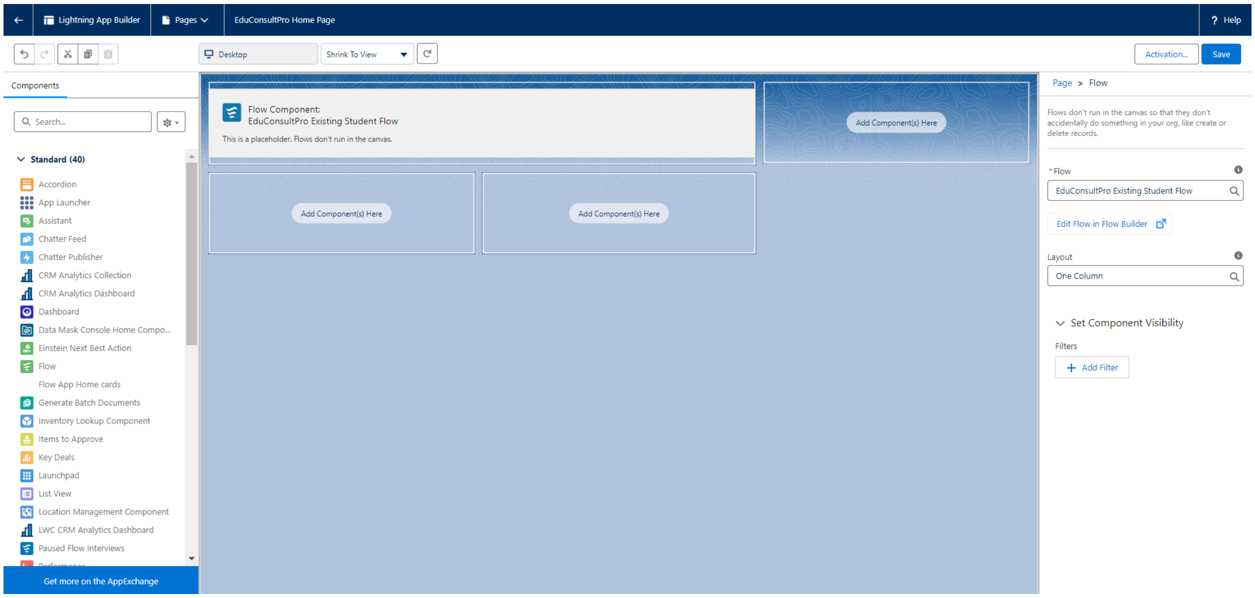
9. Assign to System Administrator Profile:

- Scroll through the profile list and select **System Administrator**.
- Click **Next**.



10. Review and Save:

- Review the assignments to ensure everything is correct.
- Click **Save** to complete the assignment.


Lightning App Builder
Pages
EduConsultPro Home Page
Help
Desktop
Shrink To View
Activation...
Save
Components
Search...
Standard (40)
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
LWC CRM Analytics Dashboard
Paused Flow Interviews
Get more on the AppExchange
Flow Component:
EduConsultPro Existing Student 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 > Flow
Flows don't run in the canvas so that they don't accidentally do something in your org, like create or delete records.
* Flow
EduConsultPro Existing Student Flow
Edit Flow in Flow Builder
Layout
One Column
Set Component Visibility
Filters
Add Filter

10. Conclusion

The **EduConsultPro platform** represents a groundbreaking, comprehensive solution that integrates both **education consulting and immigration services** into one unified, easy-to-use system. This project demonstrates the transformative power of leveraging **Salesforce's CRM capabilities**, combined with custom flows and process automation, to modernize and streamline traditional consulting services. By automating and digitizing critical workflows, **EduConsultPro** enhances the entire client experience while boosting operational efficiency.

From the **seamless appointment scheduling** system to **real-time case tracking** and **personalized email communications**, EduConsultPro simplifies otherwise complex procedures, allowing consultants and students to focus on their goals rather than getting lost in administrative tasks. With its intuitive design, the platform not only ensures that students can easily manage their educational and immigration needs, but also enables consultants to deliver higher-quality services. Features like automated approval processes, real-time case updates, and prompt email alerts significantly reduce the manual workload, freeing up valuable time for consultants to concentrate on providing personalized guidance.

Looking ahead, EduConsultPro is designed with scalability in mind, paving the way for future innovations like **AI-driven insights**, **predictive analytics**, and **enhanced reporting**. These advanced features can further refine the platform, offering deeper insights and helping consultants better understand trends, client needs, and potential improvements. As the platform evolves, it will not only continue to support students on their educational journeys but also empower consultants with tools to optimize their services.

Overall, EduConsultPro is more than just a technical achievement—it is a reflection of a commitment to creating opportunities, fostering **global education**, and empowering individuals to achieve their academic and immigration aspirations. This platform is a vital step forward in providing students with the support they need while setting a new standard in the consulting industry for efficiency, client satisfaction, and success.