A CRM Application to Manage the Services offered by an Institution

By

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Project Abstract

EduConsultPro Institute, a leading educational institution offering a diverse range of courses and programs, faces increasing challenges in managing admission applications, student inquiries, and consulting services due to the growing number of prospective students. To address these challenges, the institute aims to implement Salesforce CRM, which will streamline these processes and improve the overall experience for both students and staff.

The project will involve developing an online admission application form accessible through the institute's website. This form will collect comprehensive information from prospective students, including personal details, academic history, and qualifications, and store the submitted applications in Salesforce CRM. Automated email notifications will be sent to students upon successful submission, and admissions staff will have access to reports and dashboards to analyze application metrics, acceptance rates, and enrollment trends.

Additionally, the project will implement an approval process for consulting requests within Salesforce. This process will include automated notifications to inform students of the approval or rejection of their requests and ensure that requests are automatically submitted upon creation. Consultants will be able to view, accept, and manage these requests, as well as schedule and track consulting appointments within Salesforce.

For immigration case management, the project will develop a submission form for students to initiate cases via phone, email, or web. These cases will be recorded in Salesforce, with automated notifications sent to immigration agents and case managers for new cases. Agents will be able to process and track cases, update their status, and utilize integrated document management and communication tools to facilitate case processing.

The use of Customer Relationship Management (CRM) systems in educational institutions has been extensively studied, highlighting their potential to improve administrative efficiency and student satisfaction. According to a study by Seeman and O’Hara (2006), CRM systems can significantly enhance communication between institutions and students, leading to better management of student inquiries and support services. In the context of higher education, Taylor and O'Driscoll (2020) found that CRM implementation can streamline admissions processes, reducing the workload on administrative staff and providing a more seamless application experience for students. Additionally, research by Johnson (2019) indicates that CRM systems like Salesforce can facilitate better data management and analytics, allowing institutions to track and analyze enrollment trends, application metrics, and other key performance indicators effectively. The integration of automated notifications and approval processes within CRM systems has also been shown to improve response times and overall efficiency in handling student requests (Smith, 2018). These findings support the decision by EduConsultPro Institute to implement Salesforce CRM as a strategic move to enhance their administrative processes and student services.

By implementing Salesforce CRM, EduConsultPro Institute will achieve a streamlined and transparent admission process, efficient management of consulting requests, and effective handling of immigration cases. This will lead to improved experiences for both students and staff, and provide the institute with enhanced reporting and analytics capabilities for better decision-making and strategic planning. The overall efficiency of the institute will be significantly improved, providing a superior experience for prospective students and staff alike.

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1.Introduction

Managing the diverse and growing needs of an educational institution presents a range of challenges, particularly in the areas of admissions, student inquiries, and consulting services. Institutions must ensure high standards of efficiency and transparency to provide a positive experience for both students and staff. To address these challenges, the implementation of a robust Customer Relationship Management (CRM) system has become essential.

This project focuses on leveraging Salesforce CRM to manage the services offered by an educational institution. Salesforce CRM is renowned for its ability to streamline complex processes, enhance communication, and provide comprehensive data management and analytics solutions. By adopting Salesforce CRM, the institution aims to automate and optimize the admission process, consulting services, and immigration case management.

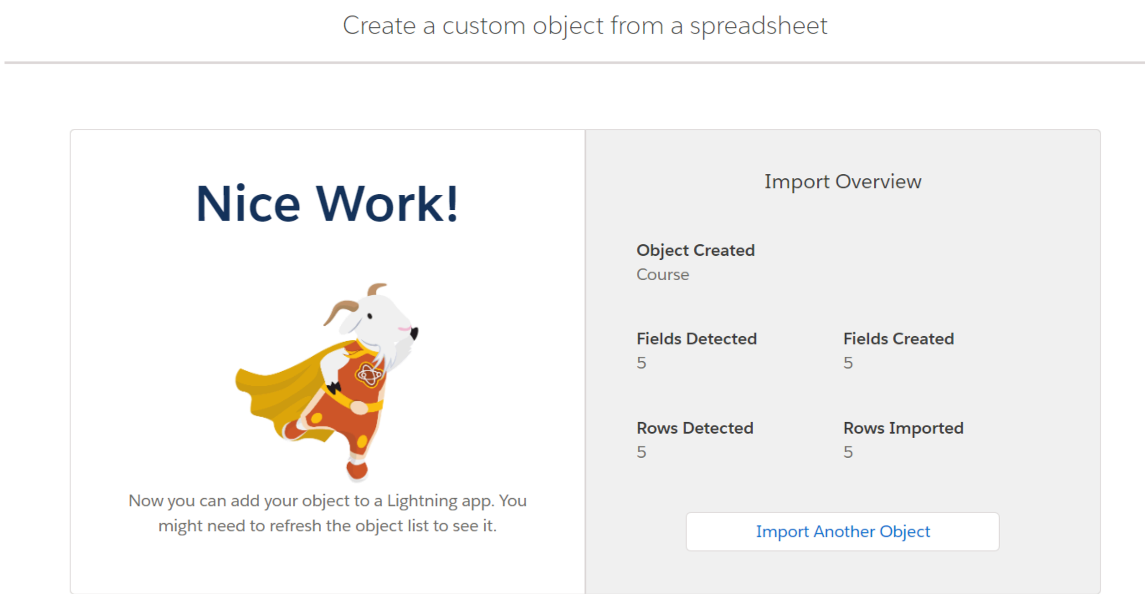
The implementation will involve developing an online admission application form, creating an approval process for consulting requests, and facilitating immigration case management through integrated submission forms and automated notifications. These enhancements are supported by extensive research, highlighting the significant benefits of CRM systems in educational contexts. Studies indicate that CRM systems can greatly improve administrative efficiency, enhance communication with students, and provide valuable insights through advanced analytics.

This project aims to deliver a seamless and transparent experience for prospective students while enabling admissions staff to efficiently review and process applications, manage consulting requests, and handle immigration cases. The overarching goal is to enhance the overall efficiency and effectiveness of the institution's operations, ensuring the continued delivery of high-quality education and support services to its students

2.Create Objects from Spreadsheet

2.1 Create Course object

- Access your Salesforce account with your credentials.
- Click on the gear icon (Setup) in the top-right corner, select "Setup", and then click on "Object Manager".
- In Object Manager, click on the "Create Object from Spreadsheet" option.
- Obtain the Course spreadsheet from the provided link.
- Click on "Upload Spreadsheet" and select the downloaded Course file from your computer.
- Salesforce will prompt you to map the columns in the spreadsheet to the fields in Salesforce. Ensure that each spreadsheet column is correctly matched to the corresponding Salesforce field.
- After mapping the fields, review the settings and click "Create" to finalize the creation of the Course object.
- Go to Object Manager, find the new Course object, and check that all fields and data have been correctly imported.

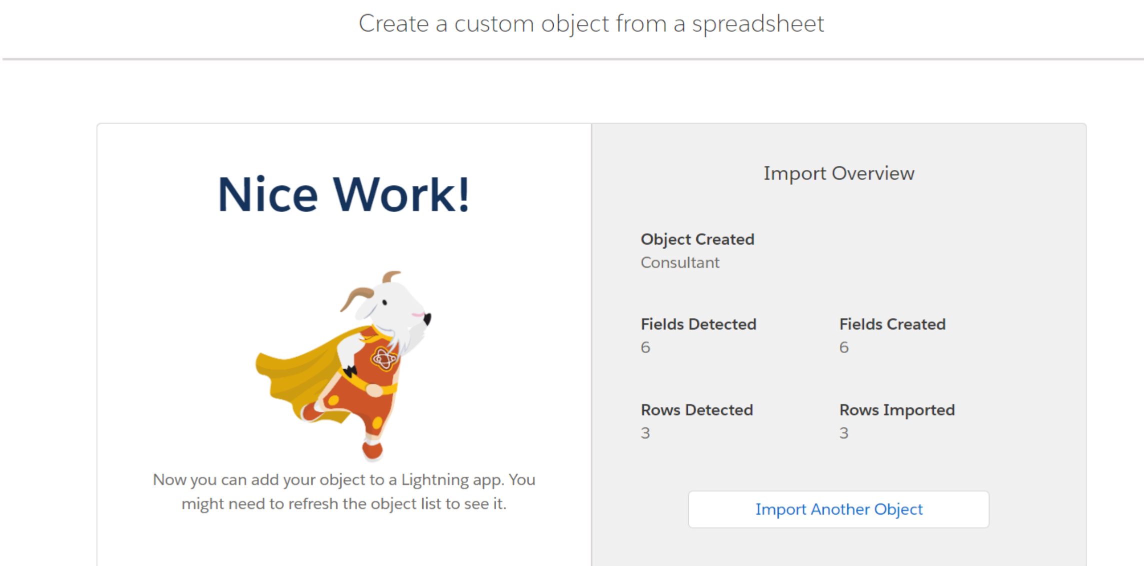


2.2 Create Remaining objects

Follow the steps which we have followed for course object creation

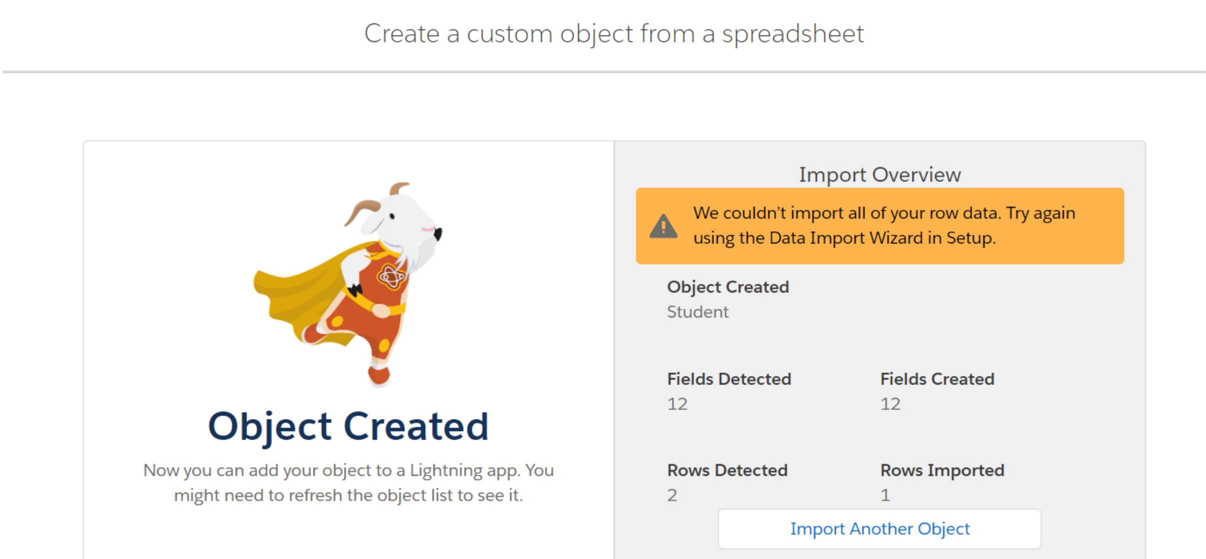
Consultant Object Creation

- Log in to Salesforce, navigate to Object Manager, and select "Create Object from Spreadsheet." Upload the Consultant spreadsheet file from your computer.
- Salesforce will prompt you to map the spreadsheet columns to the corresponding Salesforce fields. Ensure that each column is accurately matched.
- After clicking "Create," check Object Manager to confirm that the Consultant object has been successfully created and the data is correctly imported.



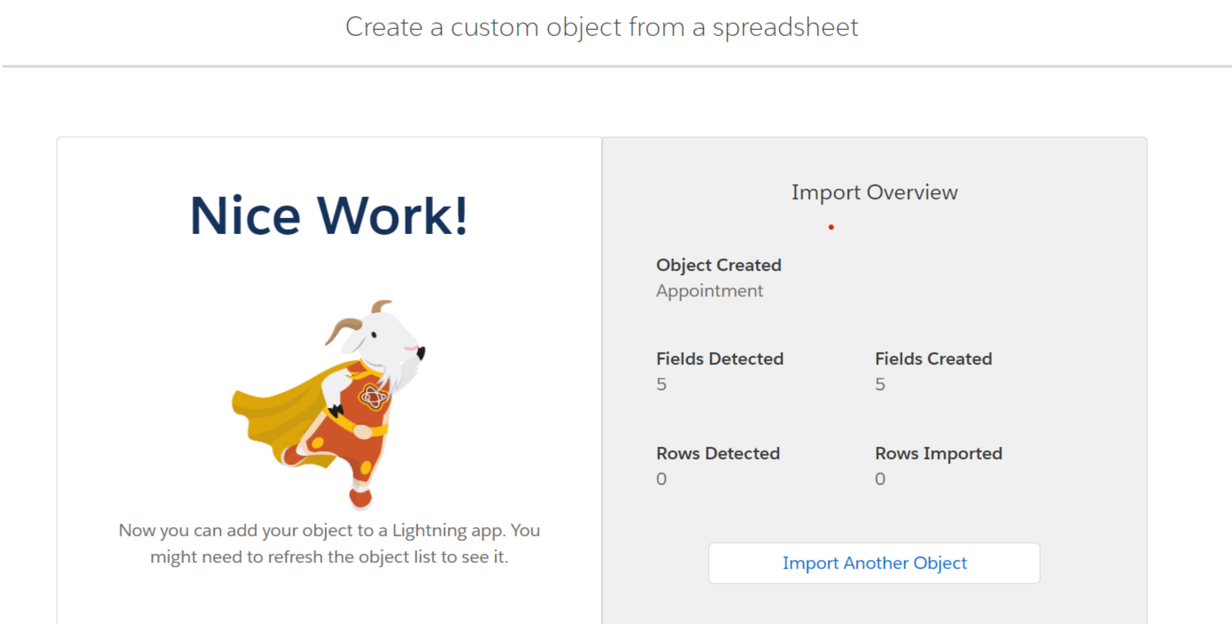
Student Object Creation

- Log in to Salesforce, access Object Manager, and choose "Create Object from Spreadsheet." Upload the Student spreadsheet file from your computer.
- You will be prompted to map the spreadsheet columns to Salesforce fields. Ensure correct alignment of each column.
- Click "Create" to finalize the object. Verify in Object Manager that the Student object is created and that the data has been properly imported.



Appointment Object Creation

- Log in to Salesforce, go to Object Manager, and select "Create Object from Spreadsheet." Upload the Appointment spreadsheet file from your computer.
- During the upload, map the spreadsheet columns to Salesforce fields, ensuring each column is accurately matched.
- Click "Create" to finalize the Appointment object and then check Object Manager to ensure the object has been created successfully and the data is correctly imported.



2.3 <u>Create Relationship among the objects</u>

1. Create Lookup Relationships

<u>Appointment and Student:</u>

- Navigate to Object Manager: Go to Object Manager and select the Appointment object.
- Add Lookup Field: Click on "Fields & Relationships," then "New." Choose "Lookup Relationship" and select the Student object.
- Configure Field: Complete the setup to link each appointment to a specific student.

Save the changes.

Appointment and Consultant:

- Navigate to Object Manager: Select the Appointment object.
- Add Lookup Field: Click "Fields & Relationships," then "New." Choose "Lookup Relationship" and select the Consultant object.
- Configure Field: Set up the lookup field to link each appointment to a consultant. Save the changes.

2.Create the Registration Object

- **Navigate to Object Manager:**Go to Salesforce Setup by clicking the gear icon in the top-right corner and selecting "Setup."
- In the Quick Find box on the left, type "Object Manager" and select it.
- **Create New Custom Object:**In Object Manager, click on the "Create" button and select "Custom Object."

Enter the details for the new object:

  - Label: Enter "Registration." This is the name that will be displayed to users.
  - Object Name: This is automatically filled based on the Label but can be adjusted if needed.
  - Record Name: Choose how the unique identifier for each record will be created. You can use "Text" or "Auto Number." For instance, "Auto Number" might use a format like "REG-{0000}" to generate sequential numbers automatically.

- Click the "Save" button to create the Registration object. This will make it available for use in your Salesforce instance.

3.Lookup Relationship Between Student and Registration:

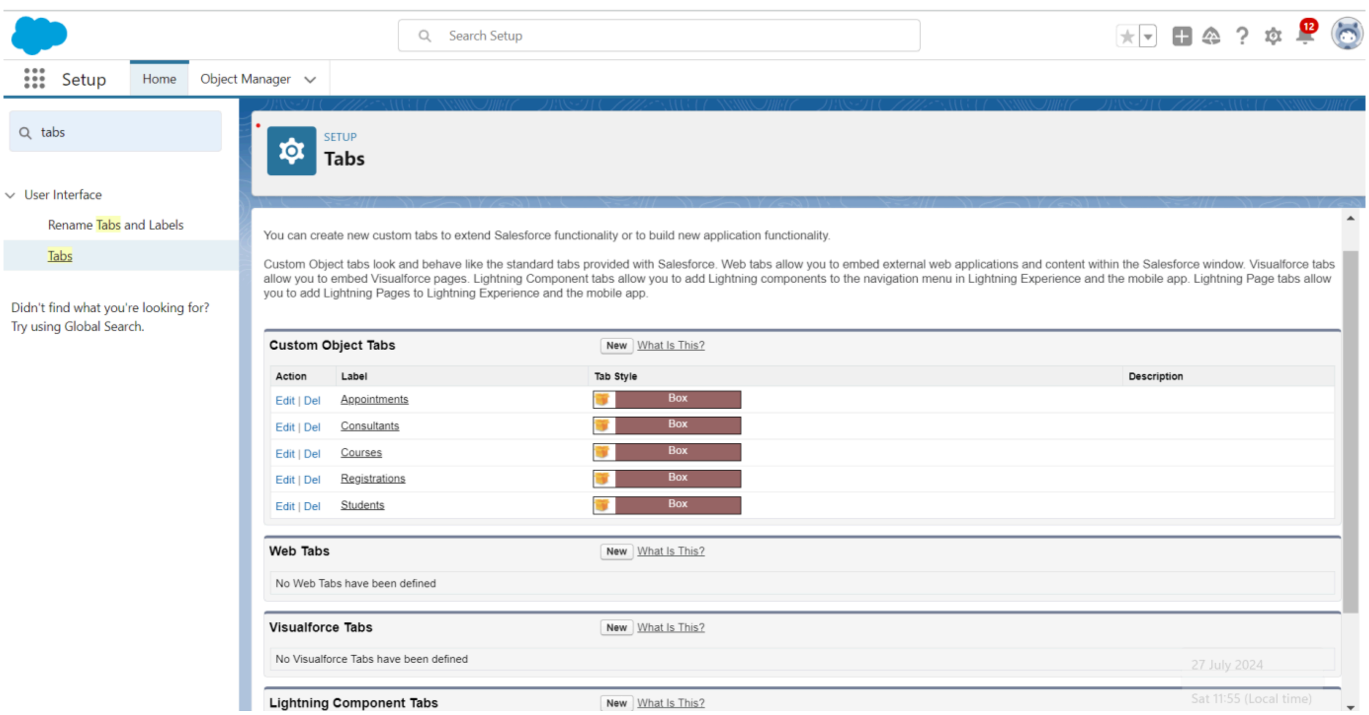
- Go to Object Manager and select the Student object.
- Click on "Fields & Relationships," then click "New." Choose "Lookup Relationship" and select the Registration object.
- Set up the lookup field to link each student to their registration records and save the changes.

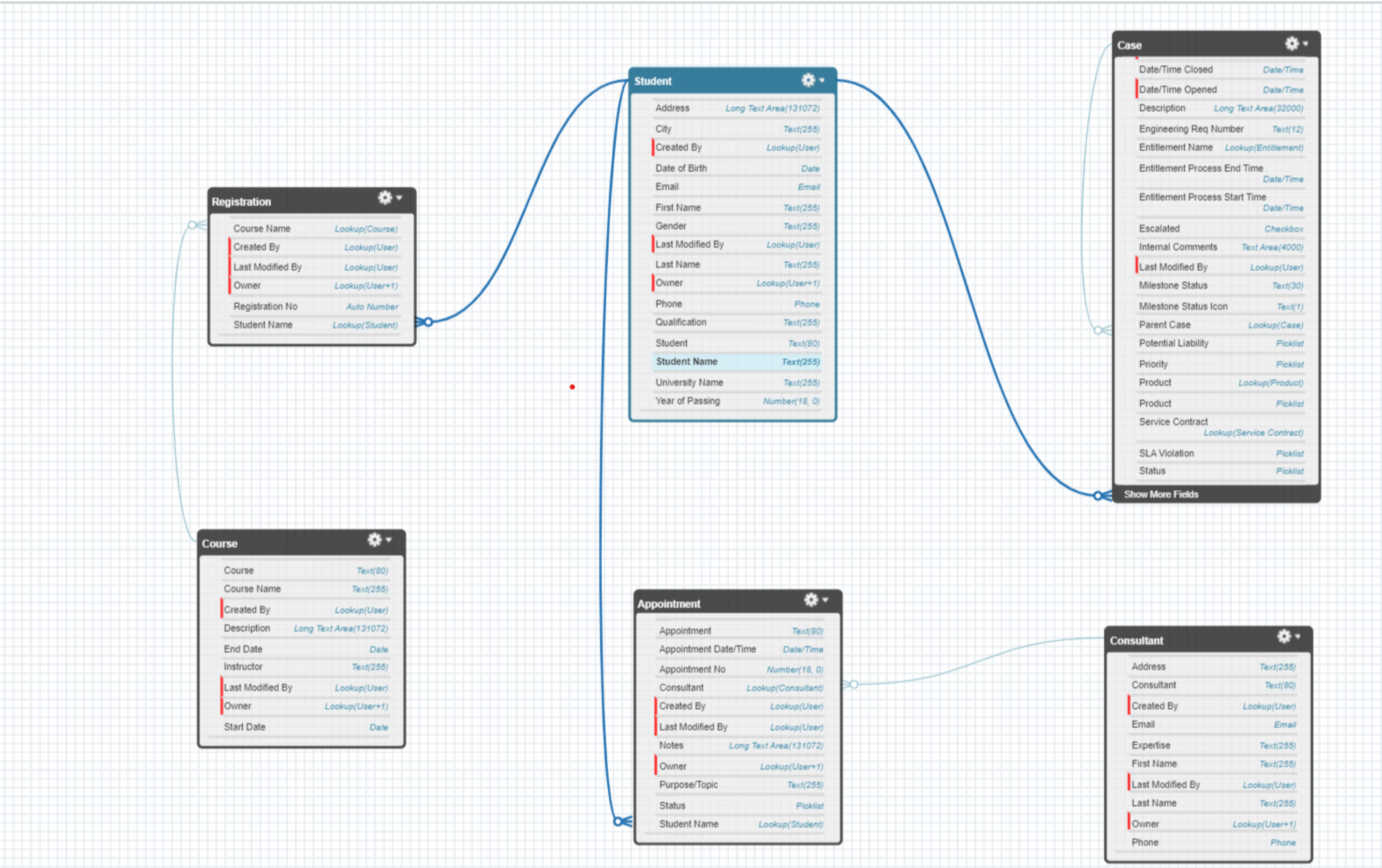
4.Lookup Relationship Between Student and Case:

- Go to Object Manager and select the Student object.
- Click on "Fields & Relationships," then click "New." Choose "Lookup Relationship" and select the Case object.
- Set up the lookup field to link each student to their immigration or visa cases and save the changes

5.Create Tabs for the Objects

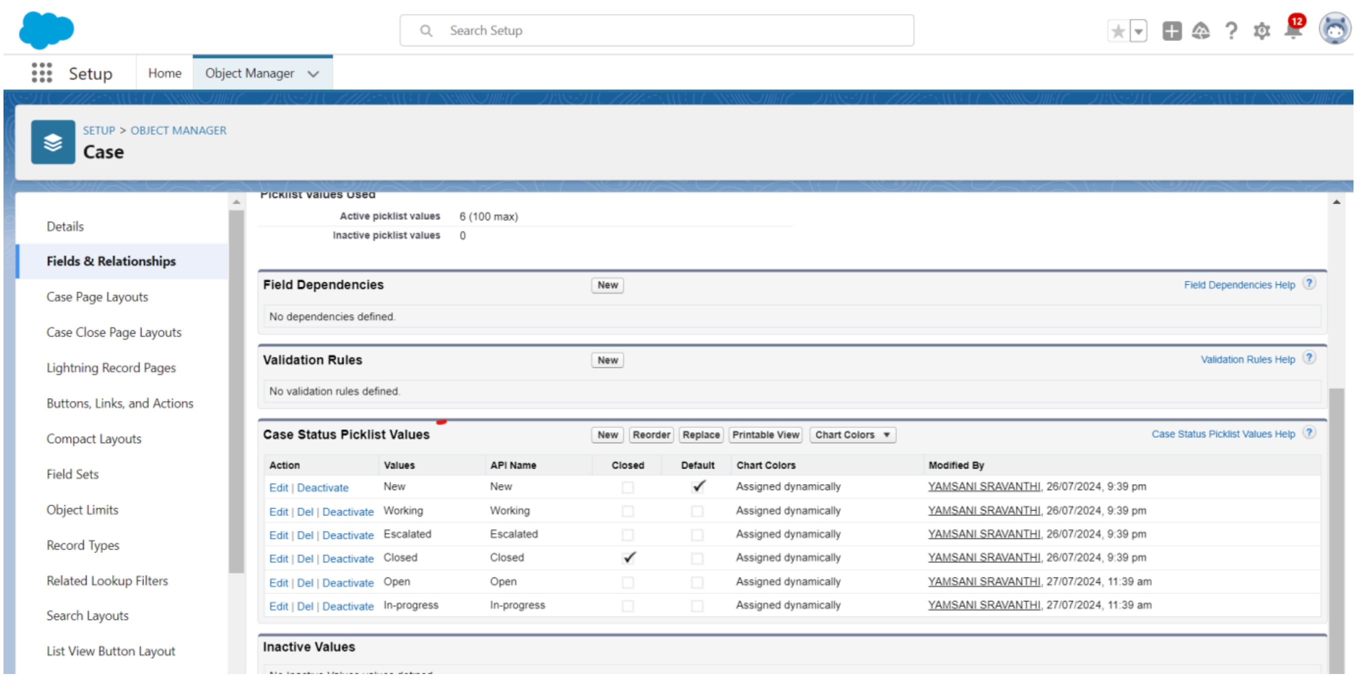
- Access Setup and type "Tabs" in the Quick Find box.
- Click "New" next to the Custom Object Tabs section.
- Choose the object you want to create a tab for (e.g:Registration).
- Choose a tab style and configure the settings.
- Save your changes and ensure that the new tabs are visible in the Salesforce interface for easy access to the respective objects.





2.4 Configure the Case Object

- Go to Object Manager and select the Case object.
- Click on "Fields & Relationships" and select the "Type" field to edit.
- Add the following values to the "Type" field:
  - Immigration
  - Visa Application
- Save the changes to the "Type" field.



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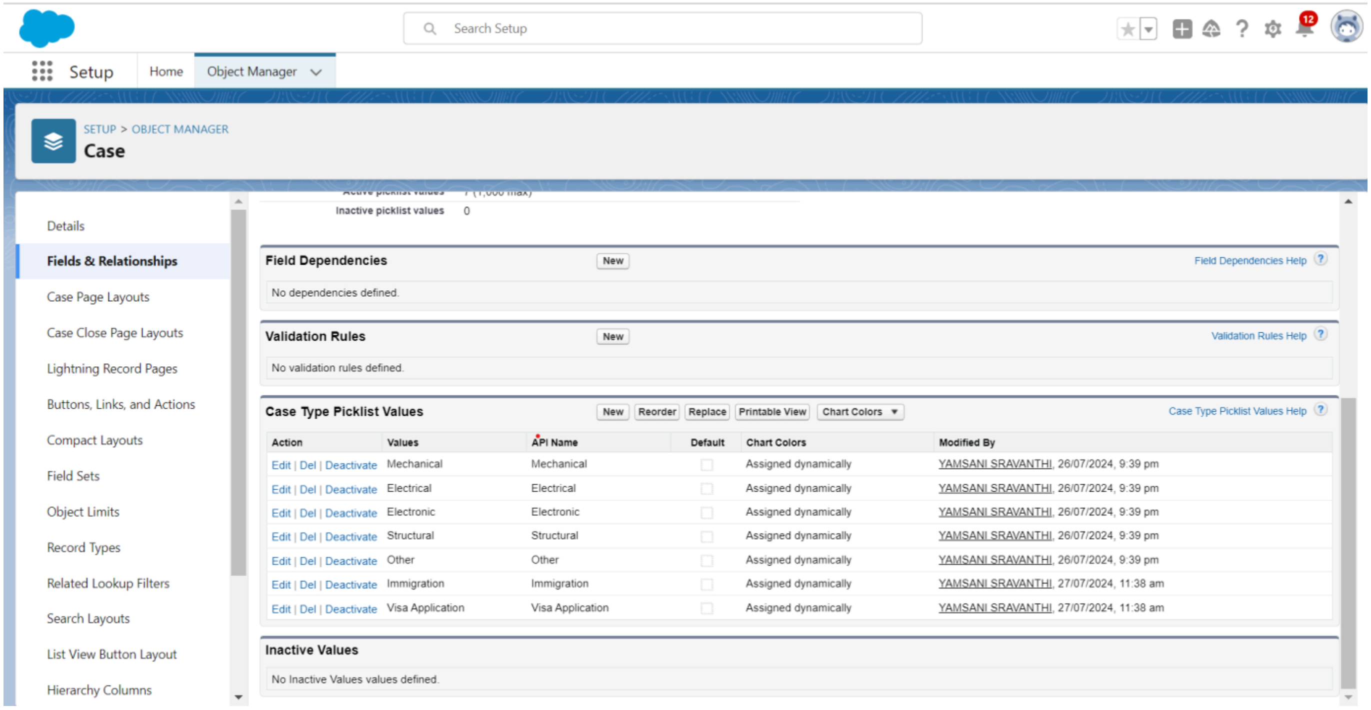
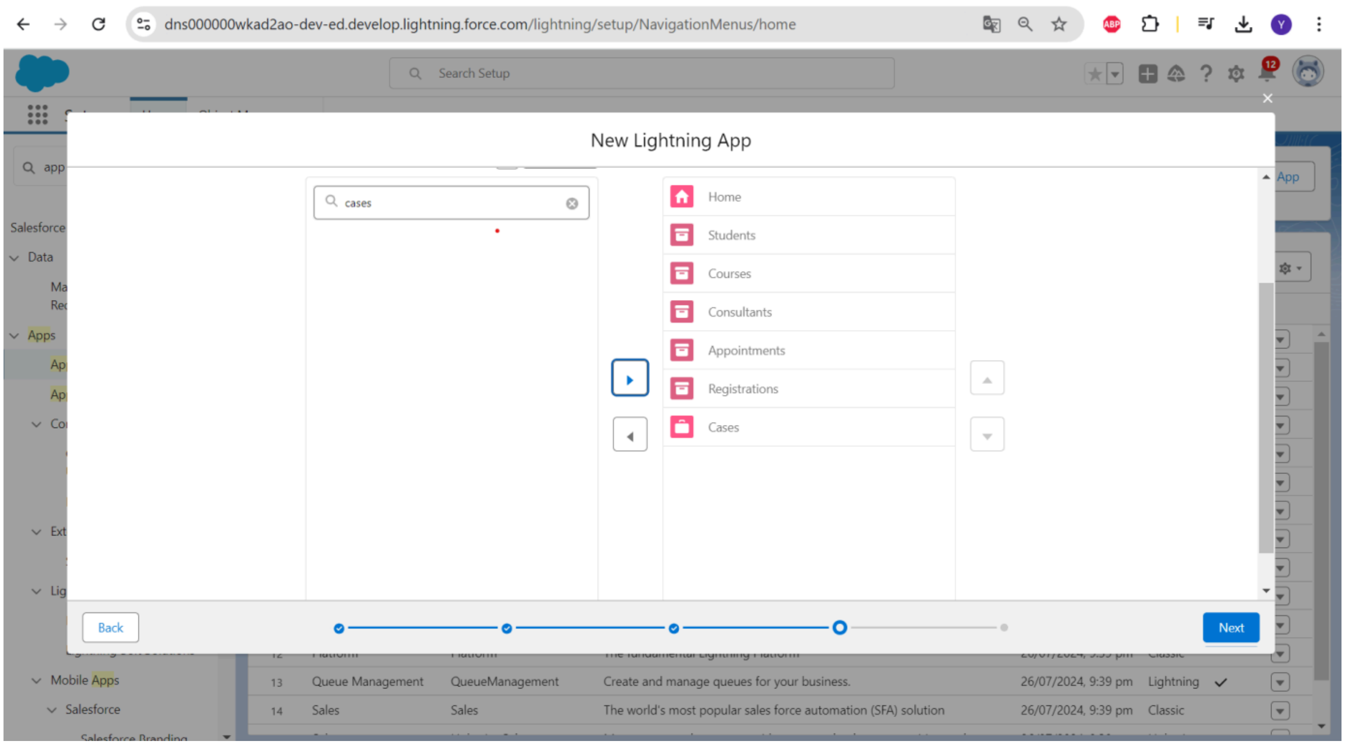
- Select the "Status" field to edit.
- Add the following values to the "Status" field:
  - Open
  - In-progress
- Save the changes to the "Status" field.
- Review and confirm that the values have been correctly added and are available for use in the Case object.



2.5 Create a Lighting App

- Go to Setup and search for "App Manager" in the Quick Find box.
- Click on "New Lightning App."
- Enter the app name as “EduConsultPro,” then click Next, Next, Next.
- In the "Available Items" section, add Home, Students, Courses, Consultants, Appointments, Registrations, and Cases to the "Selected Items."
- In the "Available Profiles" section, add the “System Administrator” profile to the "Selected Profiles."
- Click "Save & Finish" to create the Lightning App.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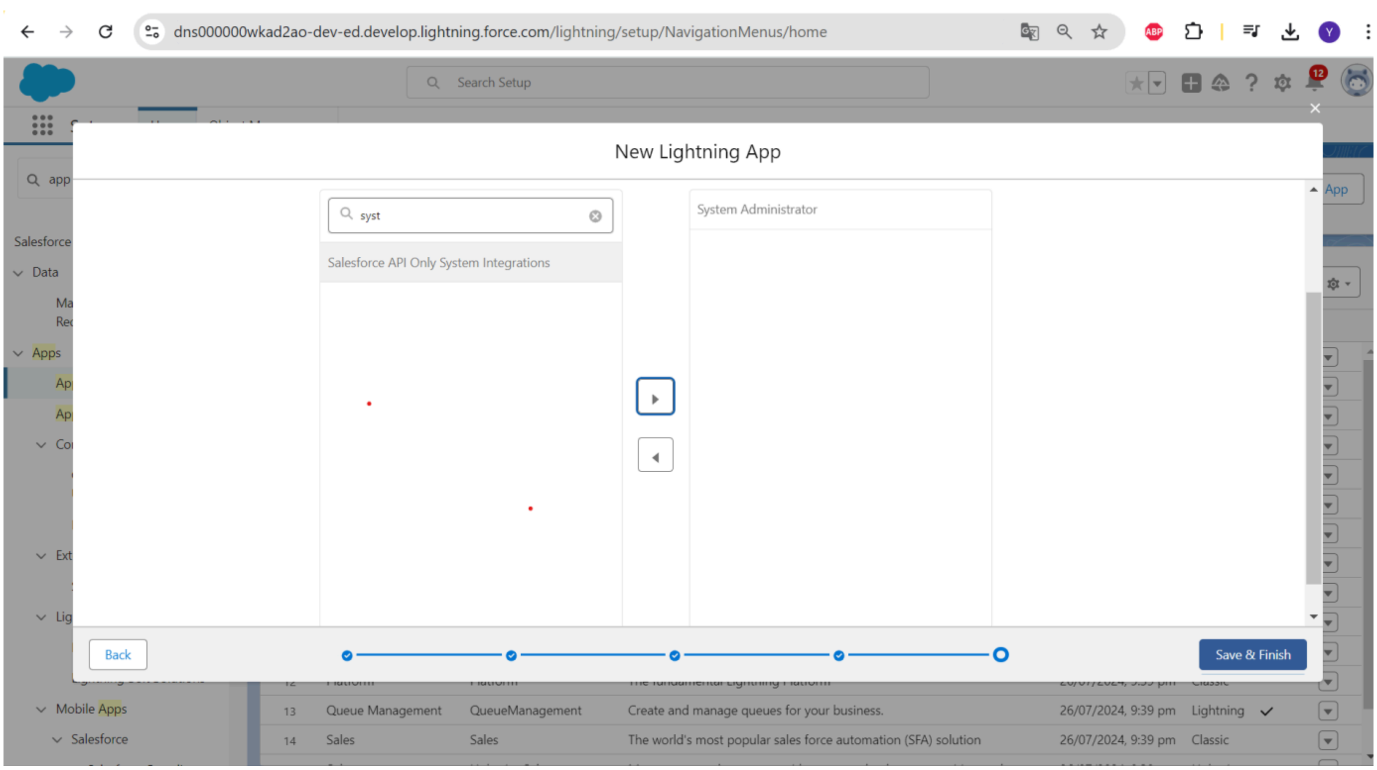
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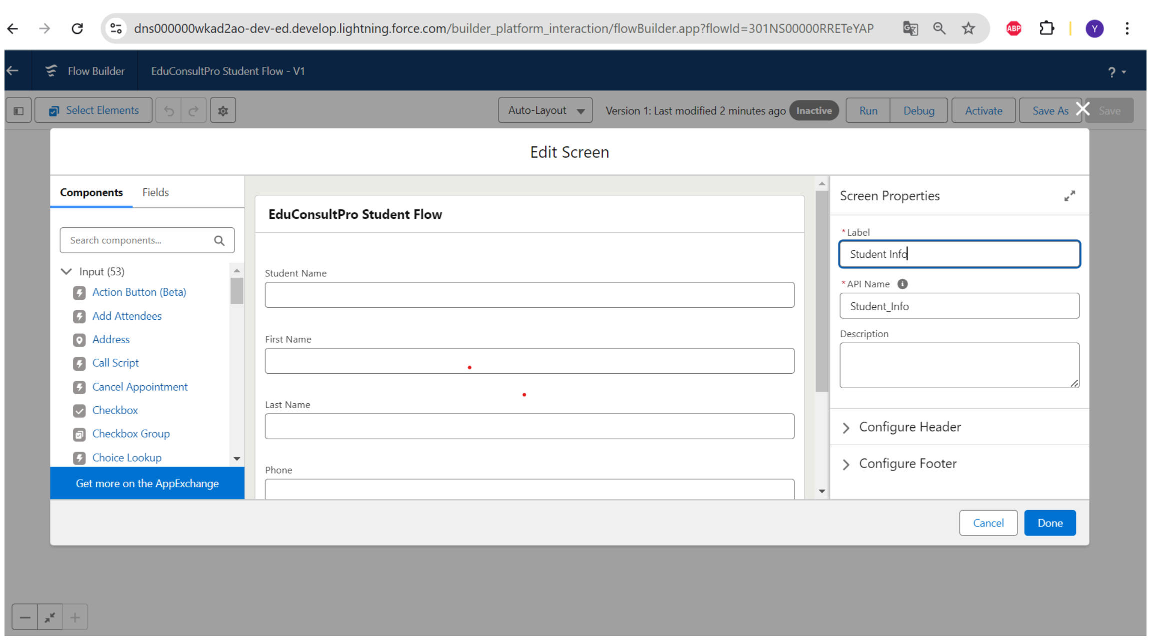
14 Sales Sales The world's most popular sales force automation (SFA) solution 26/07/2024, 9:39 pm Classic

3.Create a ScreenFlow for Student Admission Application process.

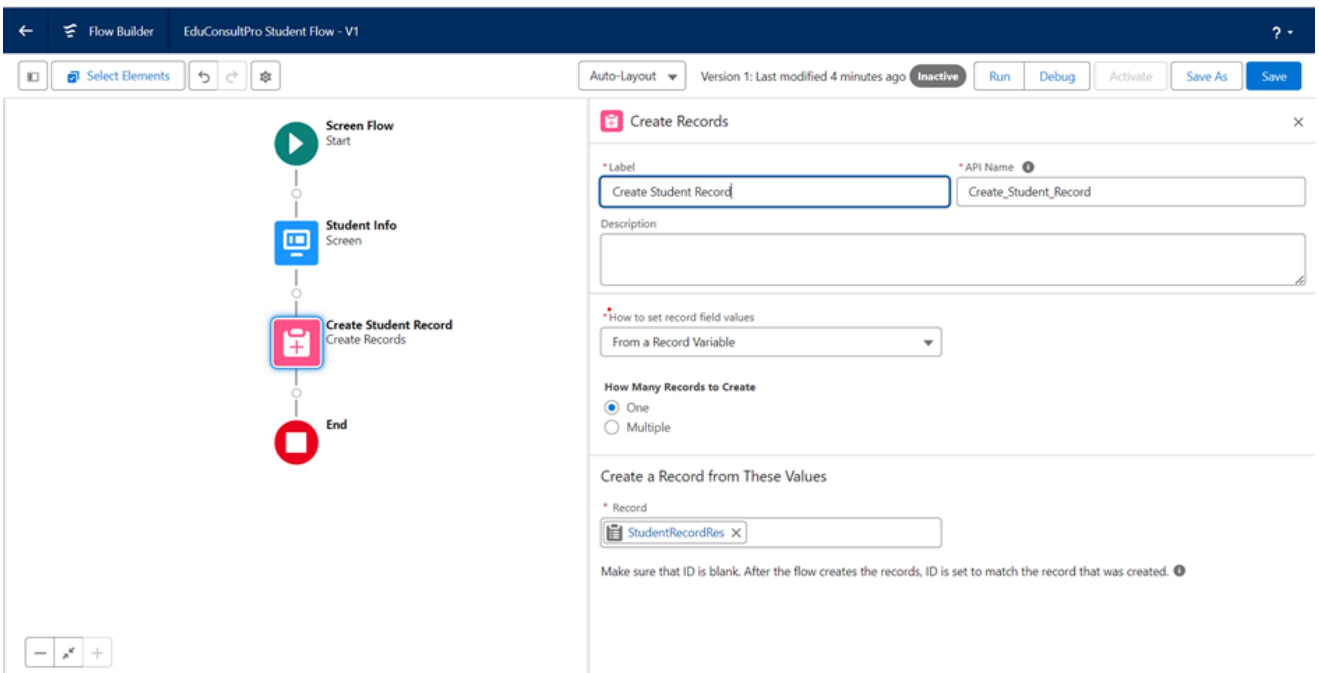
3.1 Add Screen Element

- From Setup, enter "Flow Builder" in the Quick Find box and select "New Flow."
- Choose "Screen Flow" and click "Create."
- Add a Screen element to the flow by dragging it from the toolbox onto the canvas.
- In the Screen Properties pane, enter “Student Info” for the Label.
- Click on "Fields" in the Screen Properties pane, then click on the record variable input.
- Create a new Resource with the name "StudentRecordRes" to display all fields from the Student object.
- Drag and drop all the necessary fields from the StudentRecordRes resource onto the screen to collect the required student information.
- Save the flow and ensure the screen is configured to capture all relevant student details.



3.2 Create Student Record using Create Element

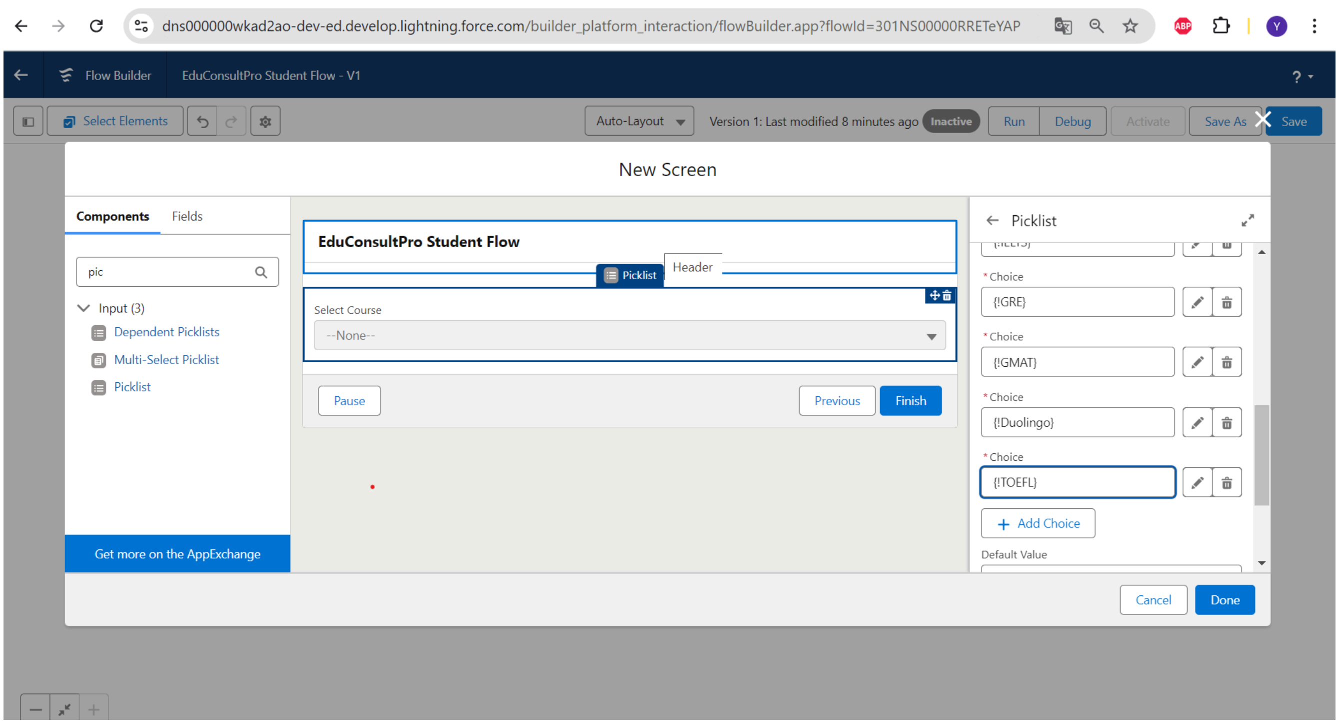
- From Setup, enter "Flow Builder" in the Quick Find box and select "New Flow."
- Choose "Screen Flow" and click "Create."
- Add a Screen element to the flow and label it “Student Info.”
- In the Screen Properties pane, click on "Fields" and create a new Resource named "StudentRecordRes" to display all fields from the Student object.
- Drag the necessary fields from "StudentRecordRes" onto the screen to collect student information.
- After the “Student Info” Screen element, add a Create element to the flow.
- Label the Create element as “Create Student Record.”
- Set How many records to Create to “one.”



3.3 Add Screen Element

- Add a Screen element to the flow after the “Create Student Record” element.
- Label the Screen element as “Course Screen.”
- From the left-side panel, add a Picklist component to the screen.
- Label the Picklist component as “Select Course.”
- Under the Choices section, type “IELTS” and press Enter. This creates a variable named IELTS.

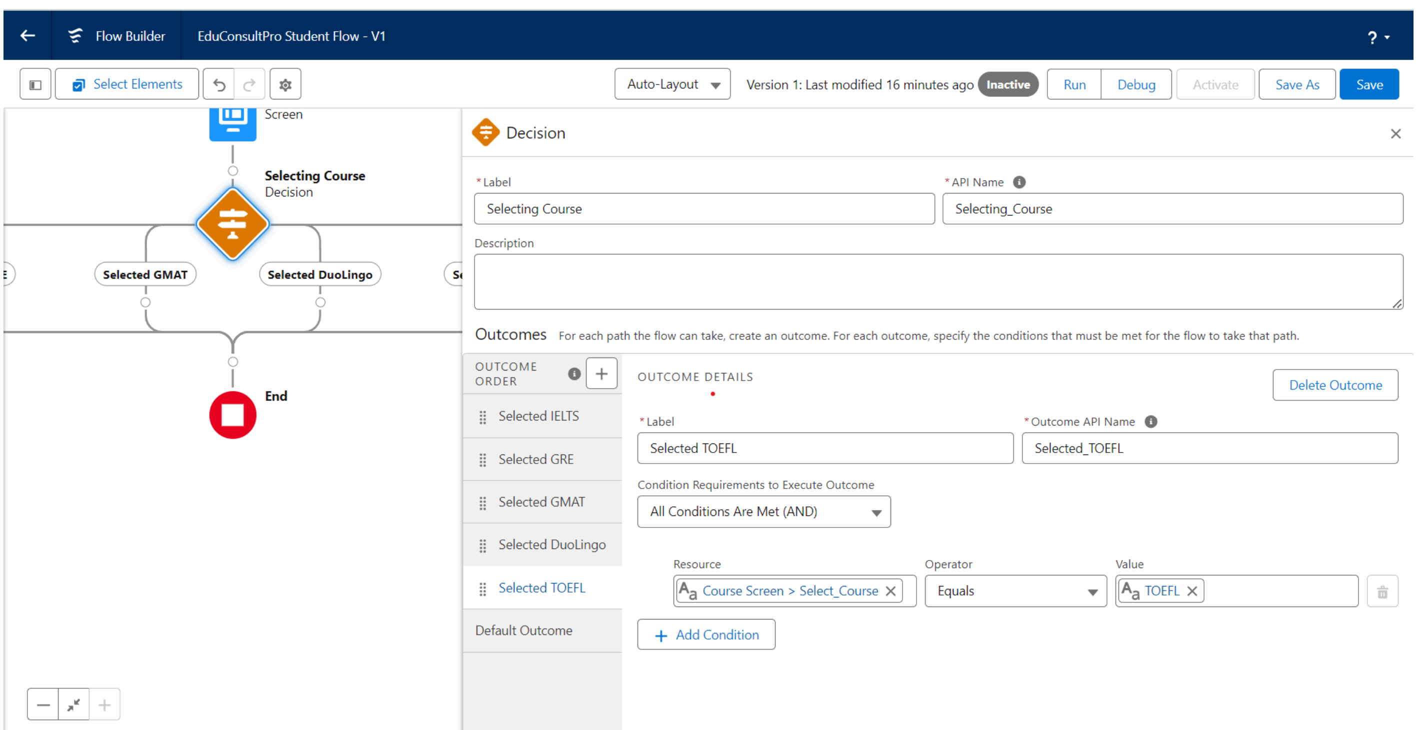
- Repeat steps 3-5 for additional courses:
- Type “GRE” and press Enter to create a variable named GRE.
- Type “GMAT” and press Enter to create a variable named GMAT.
- Type “Duolingo” and press Enter to create a variable named Duolingo.
- Type “TOEFL” and press Enter to create a variable named TOEFL.
- Save the flow.



3.4 Add Decision Element

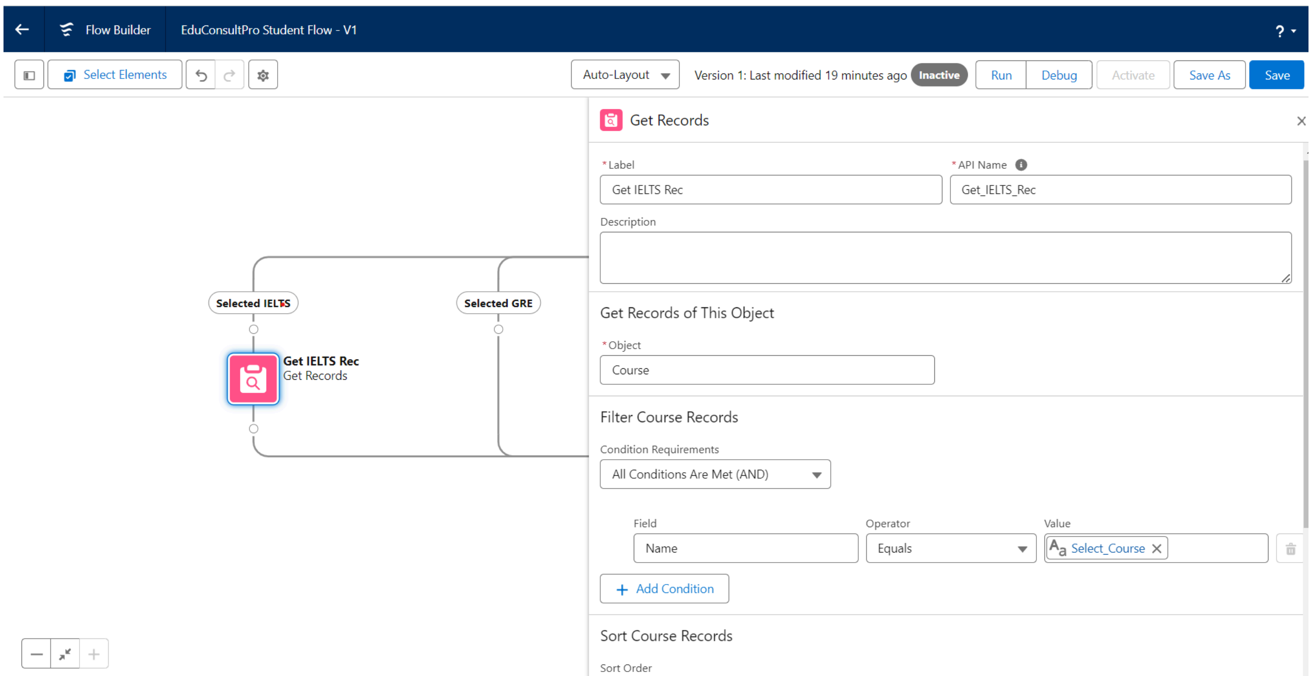
- Add a Decision element to the flow after the “Select Course Screen” element.
- Label the Decision element as “Selecting Course.”
- Under Outcome Label, enter “Selected IELTS.”
- Set the condition for this outcome:
- Resource: Select_Course (Screen Component from Select Course Screen Element)
- Operator: Equals
- Value: IELTS (Choice Variable from Select Course Screen Element)
- Click on the “+” icon to add additional outcomes.
- Repeat step 4 for the other options
- For GRE
    - Label:Selected GRE
    - Resource: Select_Course

    - Operator: Equals
    - Value: GRE
- For GMAT
    - Label:Selected GMAT
    - Resource: Select_Course
    - Operator: Equals
    - Value: GMAT
- For Duolingo
    - Label:Selected Duolingo
    - Resource: Select_Course
    - Operator: Equals
    - Value: Duolingo
- For TOEFL
    - Label:Selected TOEFL
    - Resource: Select_Course
    - Operator: Equals
    - Value: TOEFL
- · Click "Done" to finalize the Decision element configuration.

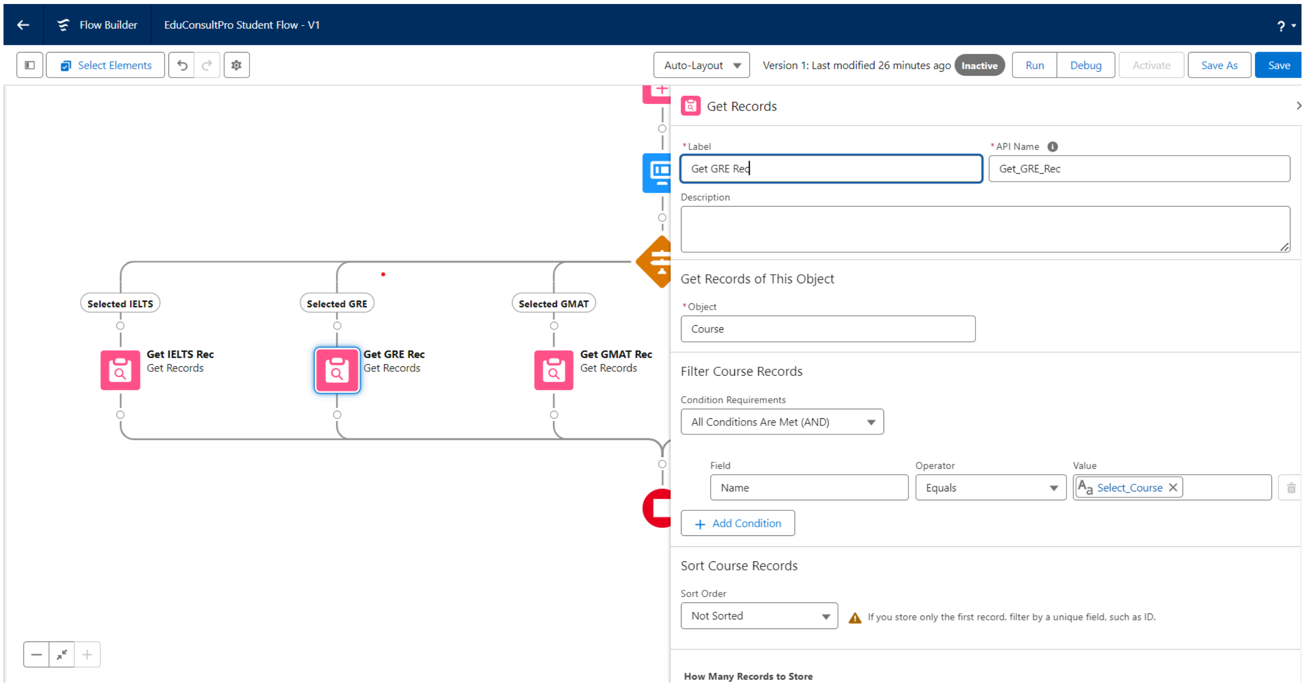


3.5 Add GET Record Element

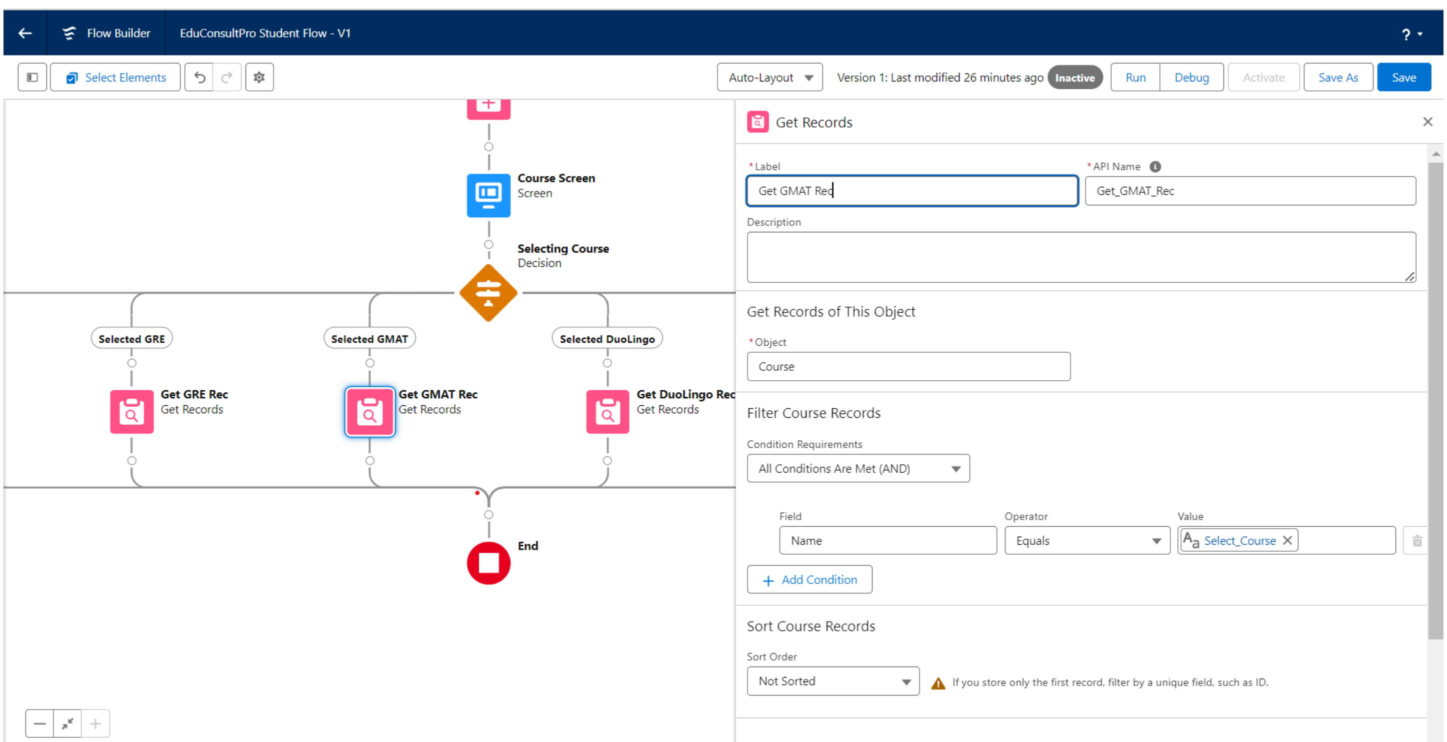
- Add a GET Record element to the flow after the Decision element, specifically under the "Selected IELTS" path.
- Label the GET Record element as "Get IELTS Rec."
- Configure GET Record Element:
  - Select Object: Course
  - Condition Requirement: All Conditions are Met (AND)
  - Field: Course Name
  - Operator: Equals
  - Value: {!Select_Course}



- Repeat for Other Paths:
- Add GET Record elements for the remaining paths:
- For GRE:
  - Label : "Get GRE Rec."
  - Field: Course Name
  - Operator: Equals
  - Value: {!Select_Course}

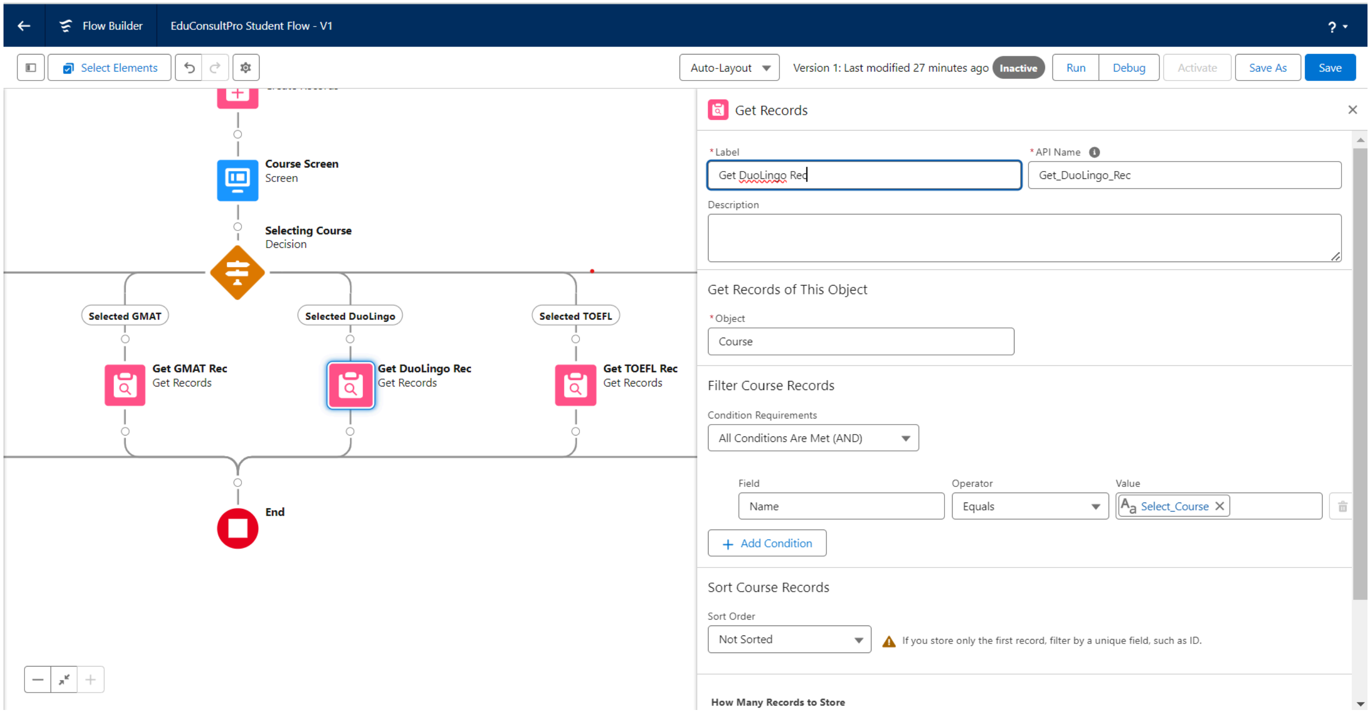


- For GMAT:
  - Label : “Get GMAT Rec.”
  - Field: Course Name
  - Operator: Equals
  - Value: {!Select_Course}

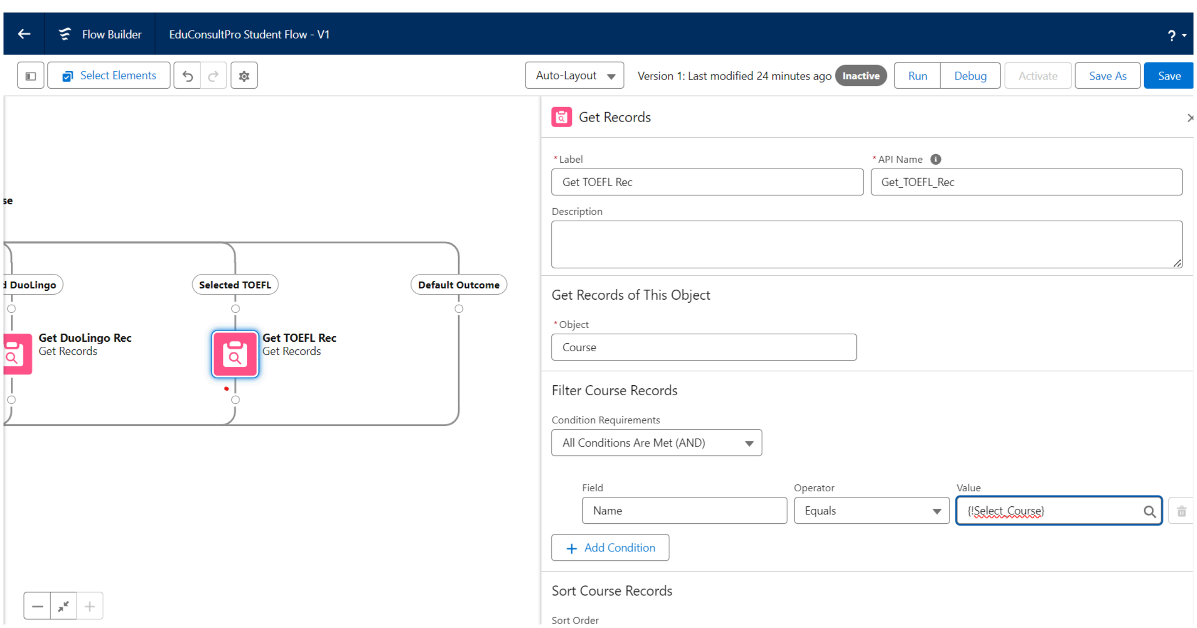


- For Duolingo:
  - Label it as “Get Duolingo Rec.”

- Field: Course Name
- Operator: Equals
- Value: {!Select_Course}



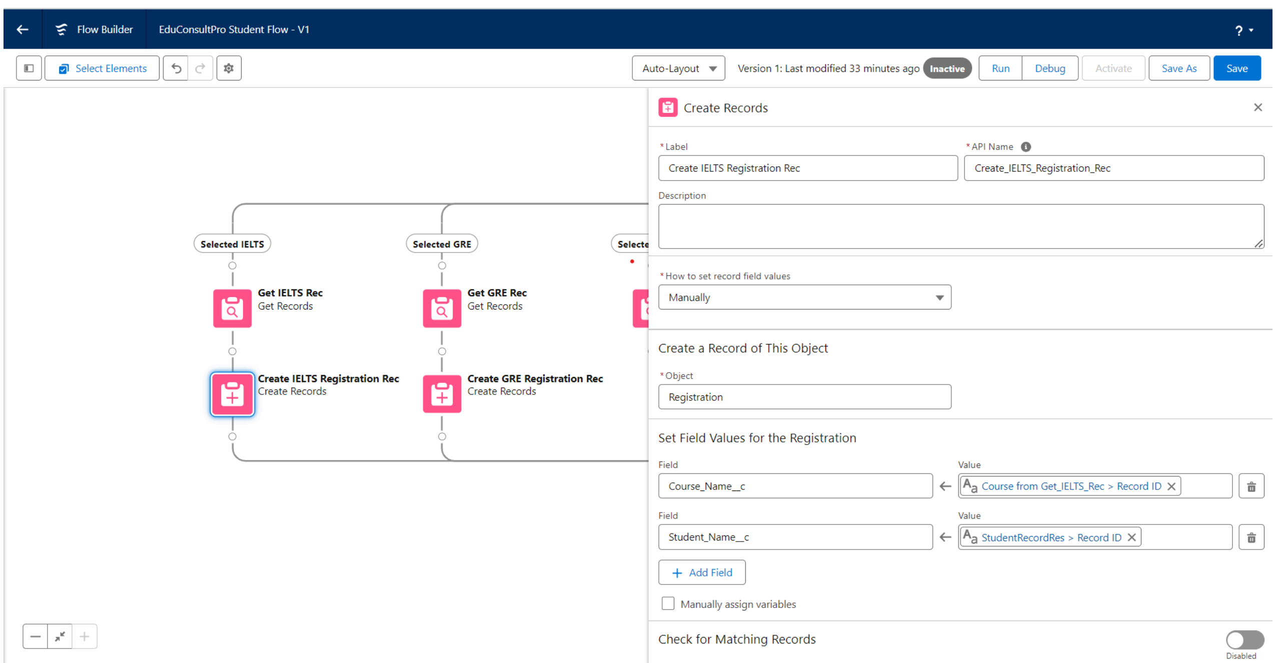
- For TOEFL:
  - Label it as “Get TOEFL Rec.”
  - Field: Course Name
  - Operator: Equals
  - Value: {!Select_Course}



- Save the Flow

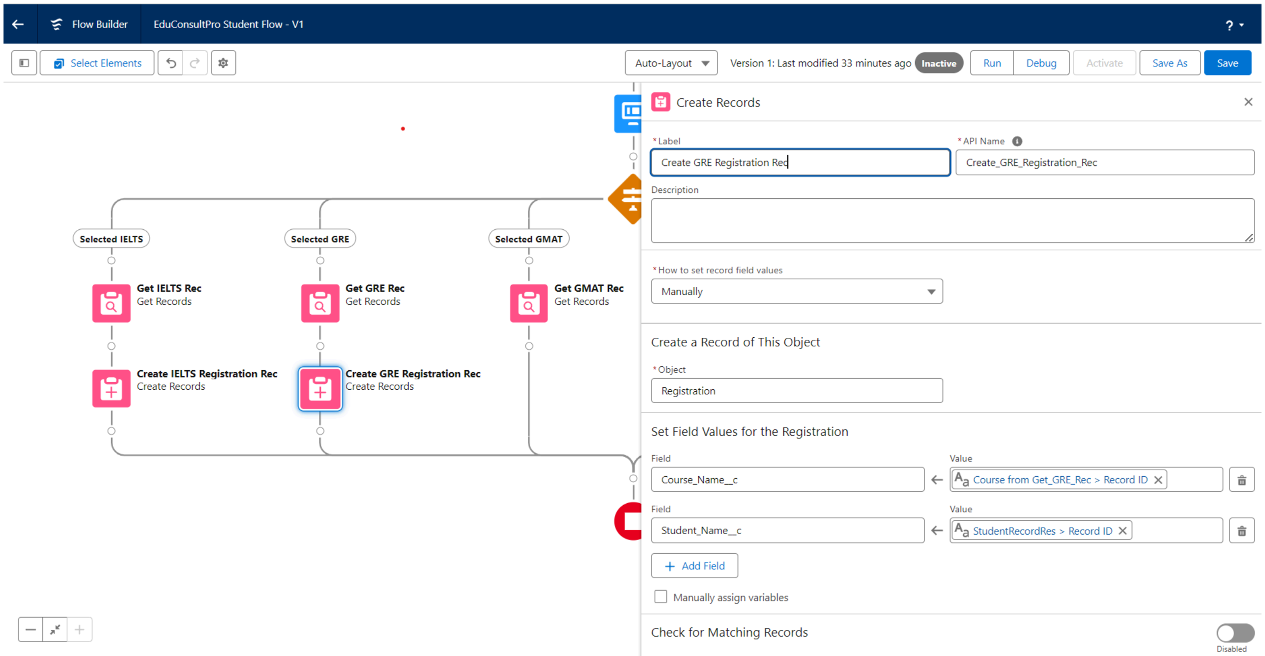
3.6 Create Registration Record using Create Records Element

- Add a Create Records Element
- Add a Create Records element to the flow after the “Get IELTS Rec” element.
- Label the Create Records element as “Create IELTS Registration Rec.”
- Configure Create Records Element:
- How many records to Create: Select “one.”
- How to Set the record fields: Choose “Use separate resources, and literal values.”
    - Select Object: Registration
    - Field: Course_Name__c
    - Value: {!Get_IELTS_Rec.Id}
    - Field: Student_Name__c
    - Value: {!StudentRecordRes.Id}

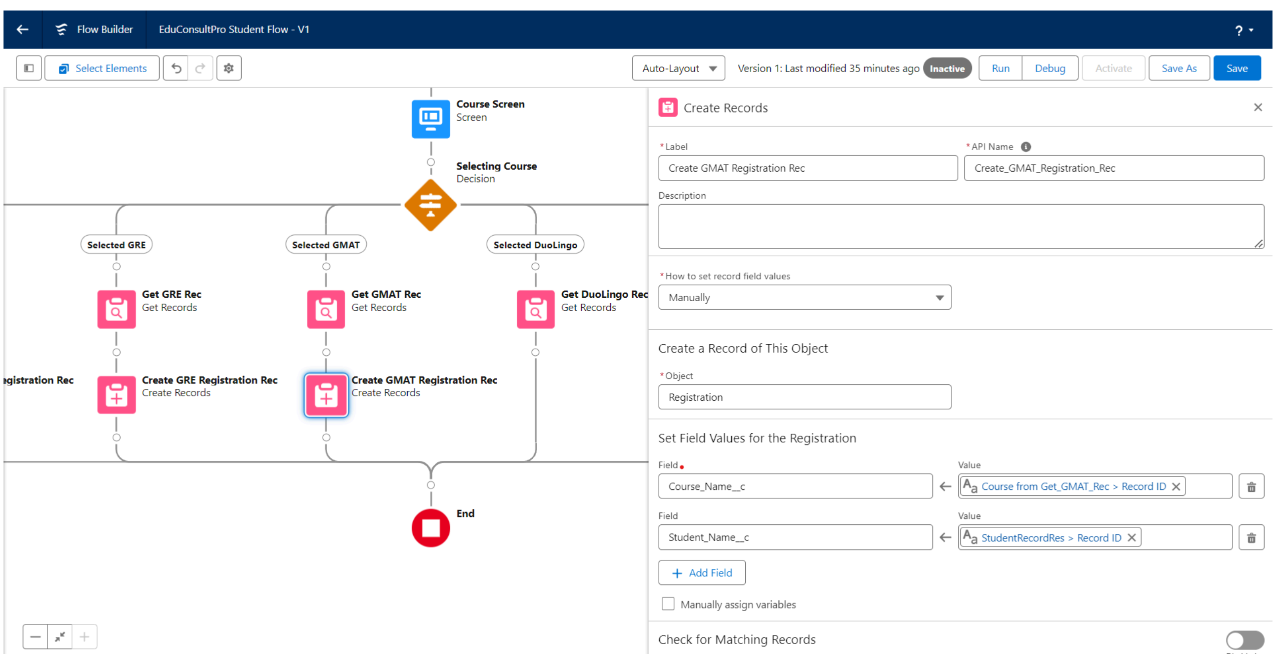


- Repeat for Other Paths
- Add Create Records elements for the remaining paths:
- For GRE:
    - Label it as “Create GRE Registration Rec.”
    - Field: Course_Name__c
    - Value: {!Get_GRE_Rec.Id}

- Field: Student_Name__c
- Value: {!StudentRecordRes.Id}

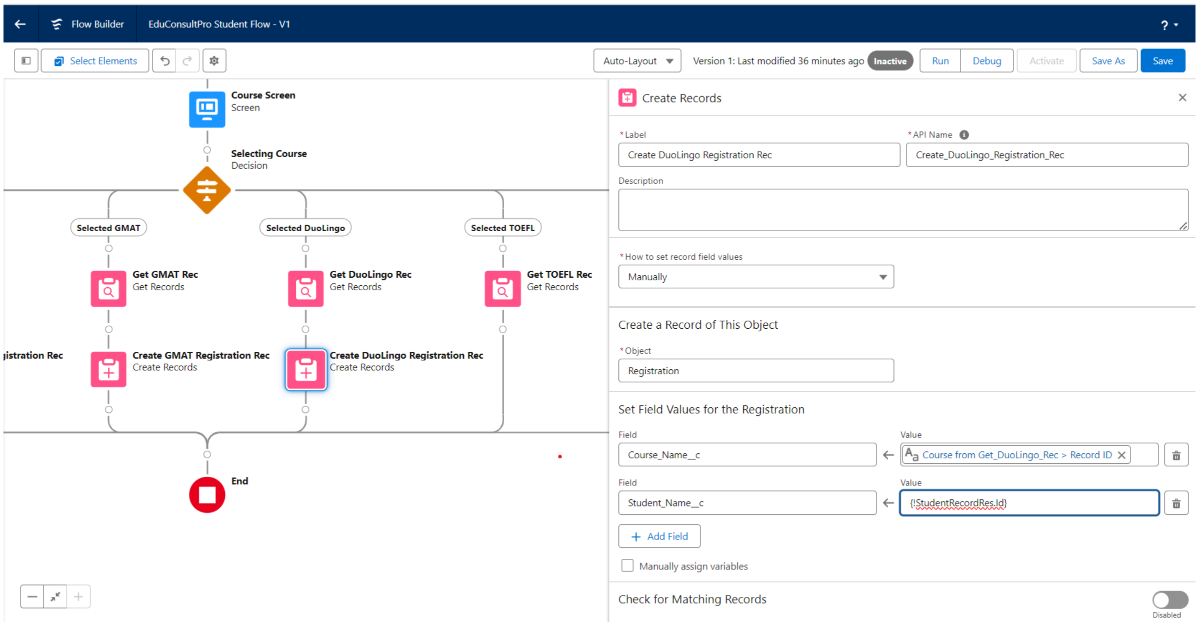


- For GMAT:
  - Label it as “Create GMAT Registration Rec.”
  - Field: Course_Name__c
  - Value: {!Get_GMAT_Rec.Id}
  - Field: Student_Name__c
  - Value: {!StudentRecordRes.Id}



- For Duolingo:

- Label it as “Create Duolingo Registration Rec.”
- Field: Course_Name__c
- Value: {!Get_Duolingo_Rec.Id}
- Field: Student_Name__c
- Value:{!StudentRecordRes.Id}



- For TOEFL:
  - Label it as “Create TOEFL Registration Rec.”
  - Field: Course_Name__c
  - Value: {!Get_TOEFL_Rec.Id}
  - Field: Student_Name__c
  - Value: {!StudentRecordRes.Id}
- Save the Flow

3.7 Create Email Text Template Variables for email body and subject

- Click on the toggle toolbox on the left corner and select “New Resource.”
- Choose “Text Template” as the Resource Type.
- Enter “StuRegistrationEmailTextTempBody” as the API Name.
- Select “View as Plain Text” and paste the following text in the body:

“Dear {!StudentRecordRes.Name},
Congratulations and welcome to EduConsultantPro!

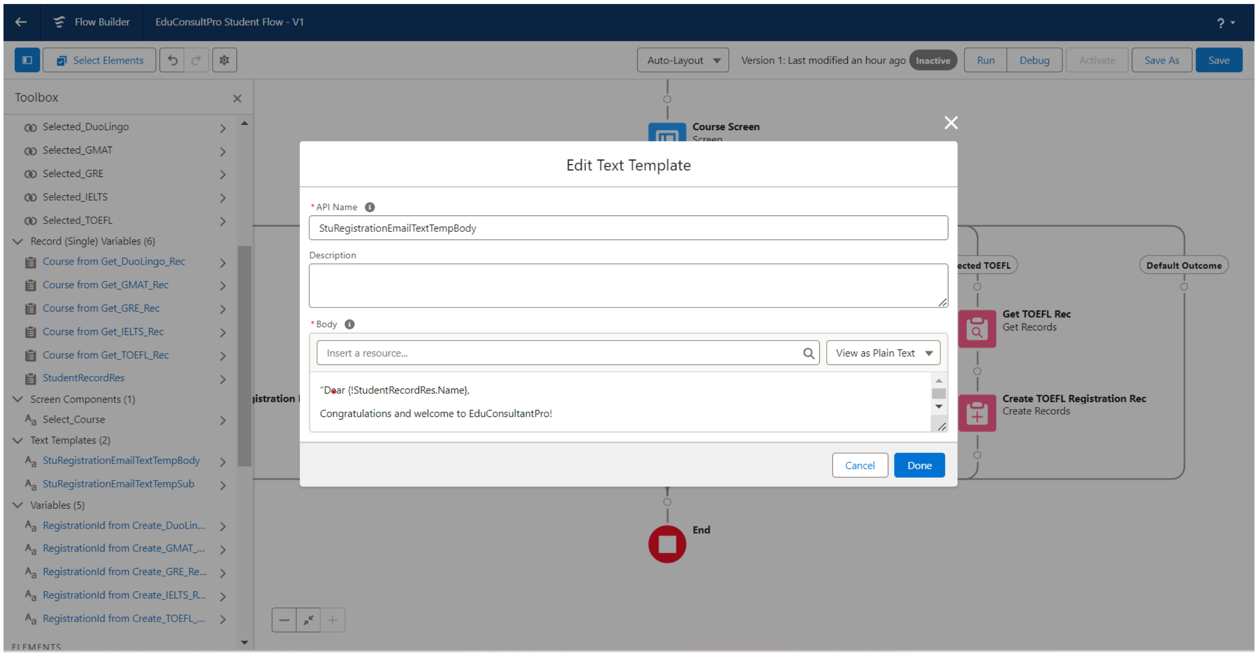
We are delighted to inform you that your registration on our platform has been successfully completed. You are now part of our esteemed community dedicated to empowering students like you to achieve their educational and immigration aspirations.

At EduConsultantPro, we understand the importance of your academic and career goals, and we are committed to providing you with the highest level of support and guidance throughout your journey.
Here are a few key points to help you get started:
Explore Our Resources : Take some time to explore the wide range of resources, tools, and services available on the EduConsultantPro platform. From educational insights to immigration advice, we offer comprehensive support tailored to your needs.
Connect with Our Consultants : Our team of experienced consultants is here to assist you at every stage of your educational and immigration endeavors. Don't hesitate to reach out to us with any questions, concerns, or inquiries you may have. We're here to help!
Stay Updated : Keep an eye on your inbox for important updates, announcements, and exclusive opportunities from EduConsultantPro. We'll ensure that you're informed about the latest developments and relevant information to support your journey.
Engage with the Community : Join our vibrant community of students, professionals, and experts who share your passion for education and global opportunities. Connect with like-minded individuals, participate in discussions, and expand your network.

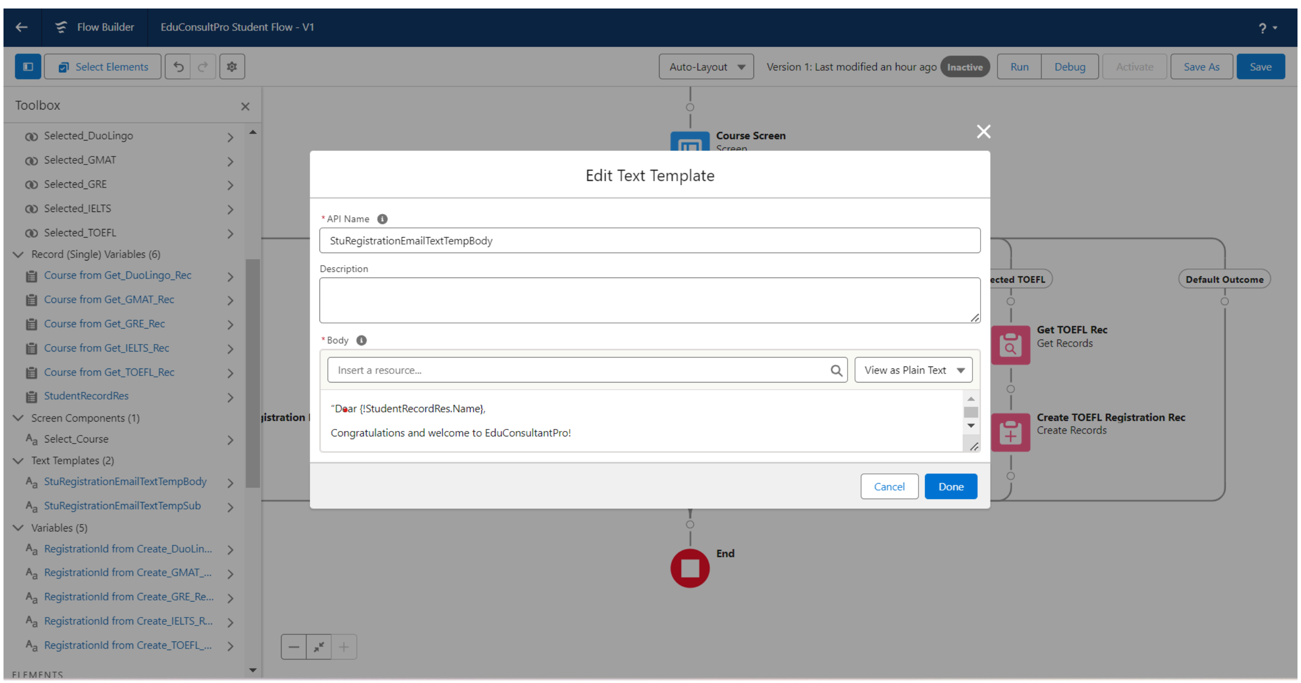
Once again, congratulations on taking this important step towards realizing your academic and career aspirations. We are thrilled to have you as part of the EduConsultantPro family and look forward to supporting you on your journey to success.
If you have any questions or need assistance, please don't hesitate to contact us.

Thank you.”

- Click “Done.”



- Repeat steps 1 & 2 to create an email text template for the email subject, label it as "StuRegistrationEmailTextTempSub", write a text message in the body and save it.



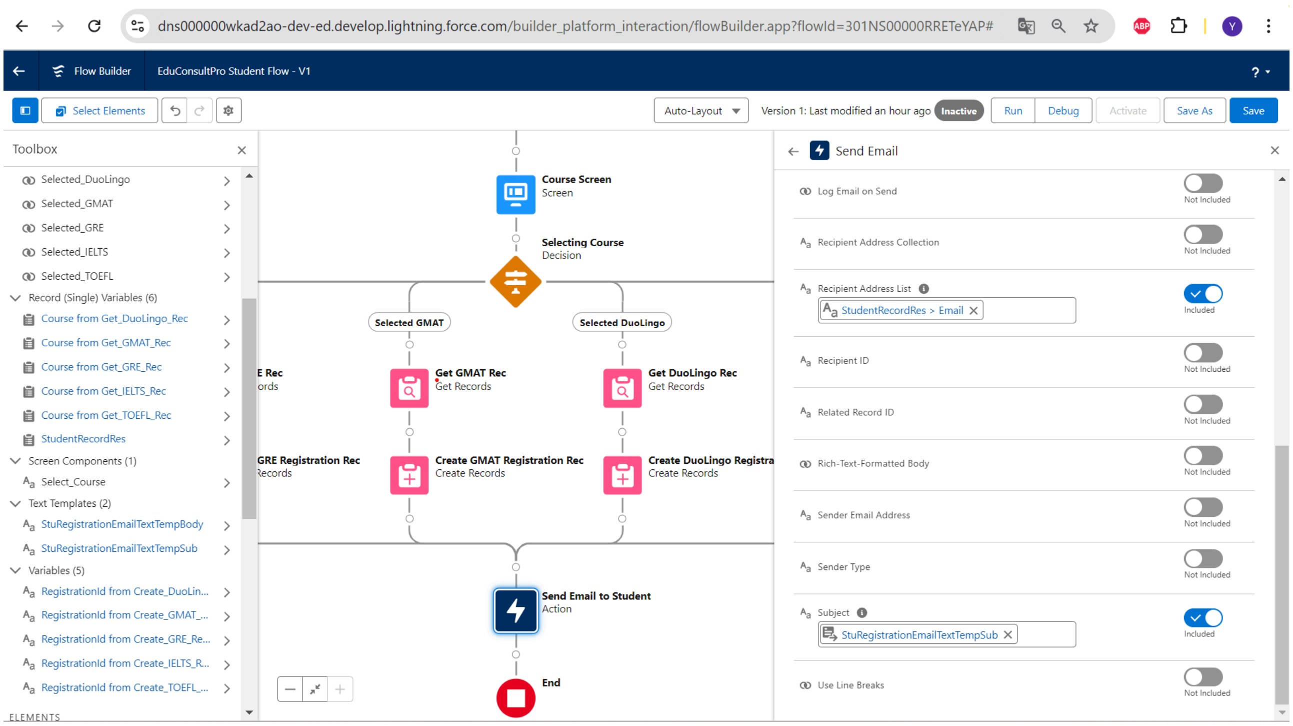
3.8 Add an Action Element

- Add an Action element to the flow after all the Decision paths.
- Label the Action element as "Send Email to Student."
- Configure Action Element:
- Under "Set input values for selected action," include the following:
- Body: {!StuRegistrationEmailTextTempBody}

■ Recipient Address List: {!StudentRecordRes.Email__c}

■ Subject: {!StuRegistrationEmailTextTempSub}

● Save the Flow.



3.9 Add Screen Element

● Add a Screen element to the flow after the "Send Email to Student" Action element and label it as "Success Screen."

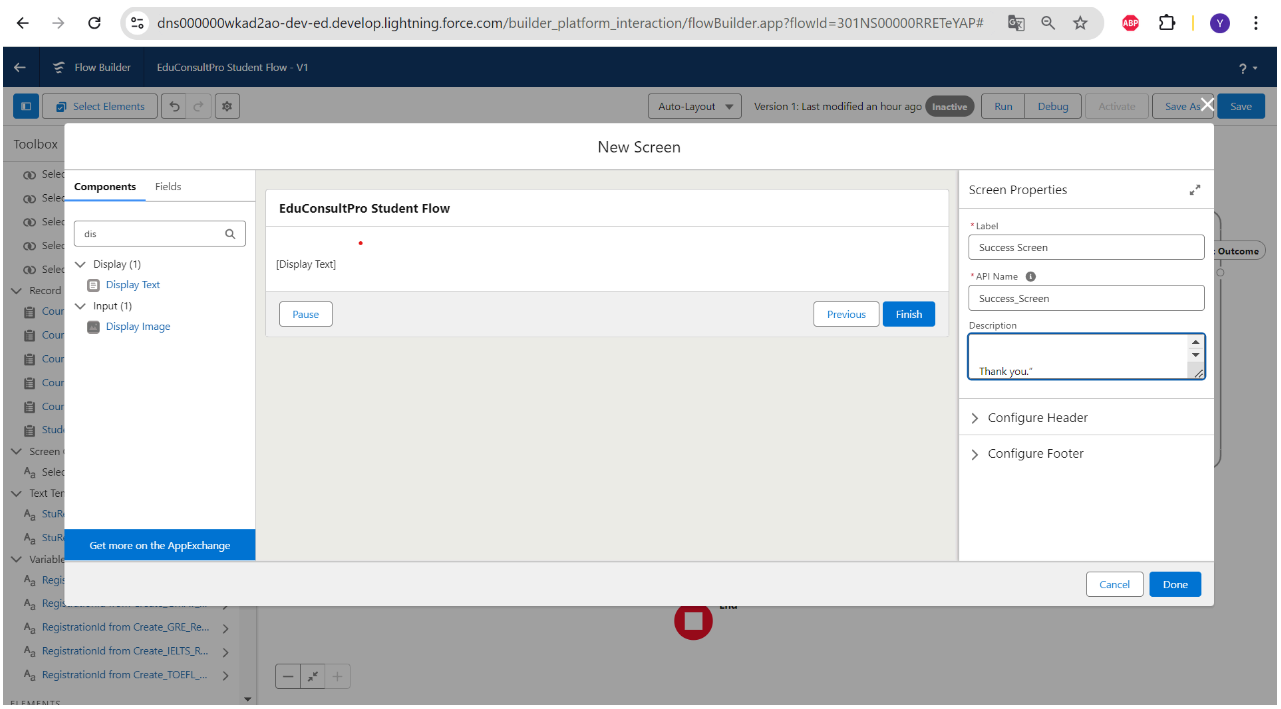
● Search for the Display Text component in the left side panel and drag it to the main panel. Label this component as "SuccessMessage."

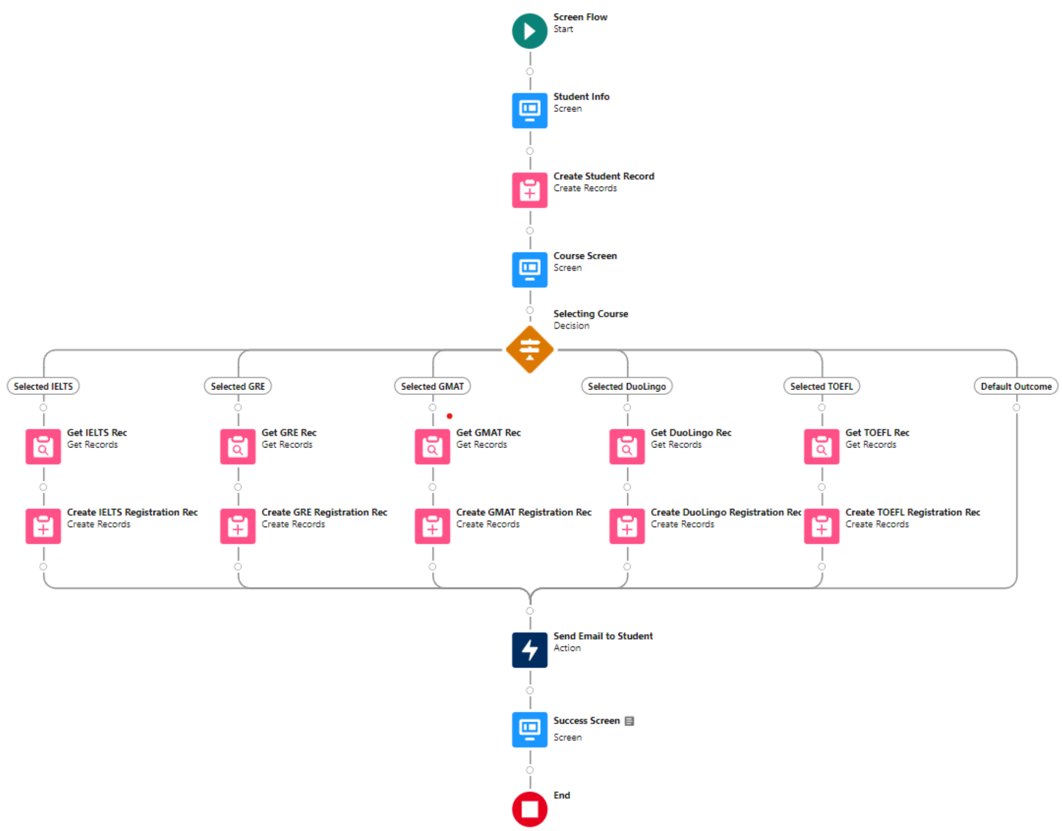
● Paste the following text into the Resource picker box:

"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 through mail kindly check it once.
Thank you."

● Click "Done" to finalize the Success Screen.

- Save the flow and name it "EduConsultPro Student Flow."

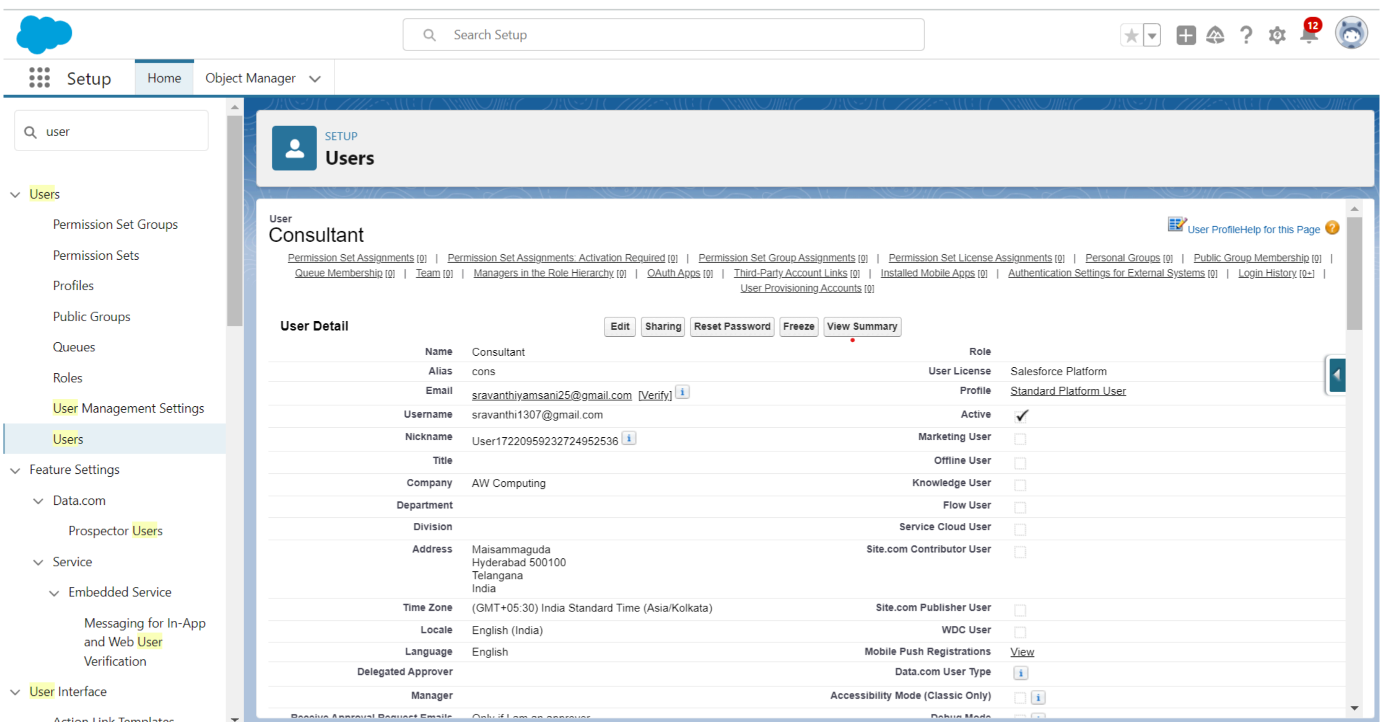




4.Create Users

4.1 User

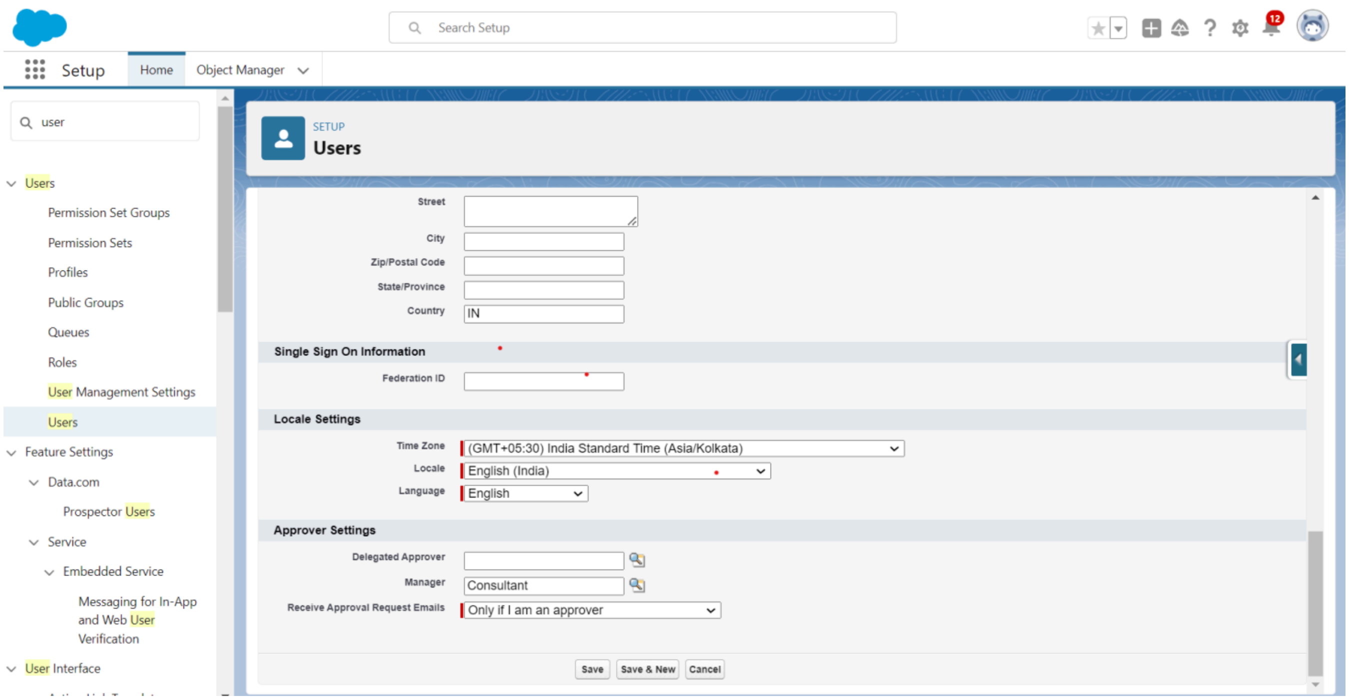
- Go to Setup.
- Navigate to Administration --> Users.
- Click on "New User."
- Enter "Consultant" in the Last Name field.
- Select "Salesforce Platform" for the License.
- Choose "Standard Platform User" for the Profile.
- Fill in all other mandatory fields.
- Click "Save."



4.2 Configure the User Settings

- Go to Setup in Salesforce.
- Under Administration, select Users.

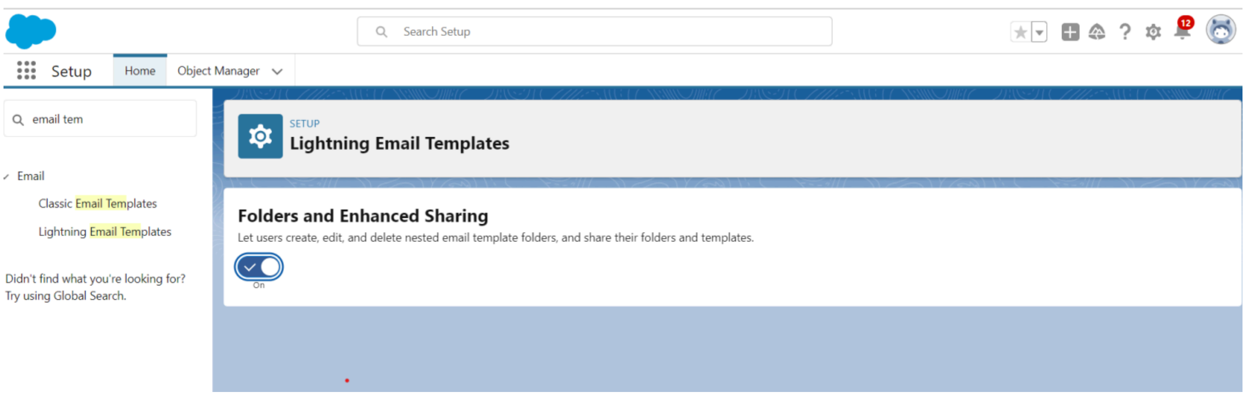
- Find your user record in the list.
- Click the "Edit" button next to your name to modify the user details.
- Scroll down to the Approver Settings section at the bottom of the page.
- In the Manager field, select “Consultant” from the drop-down list.
- Click “Save” to apply the changes to your user record.
- These steps will update your user settings to designate “Consultant” as your manager for approval processes.



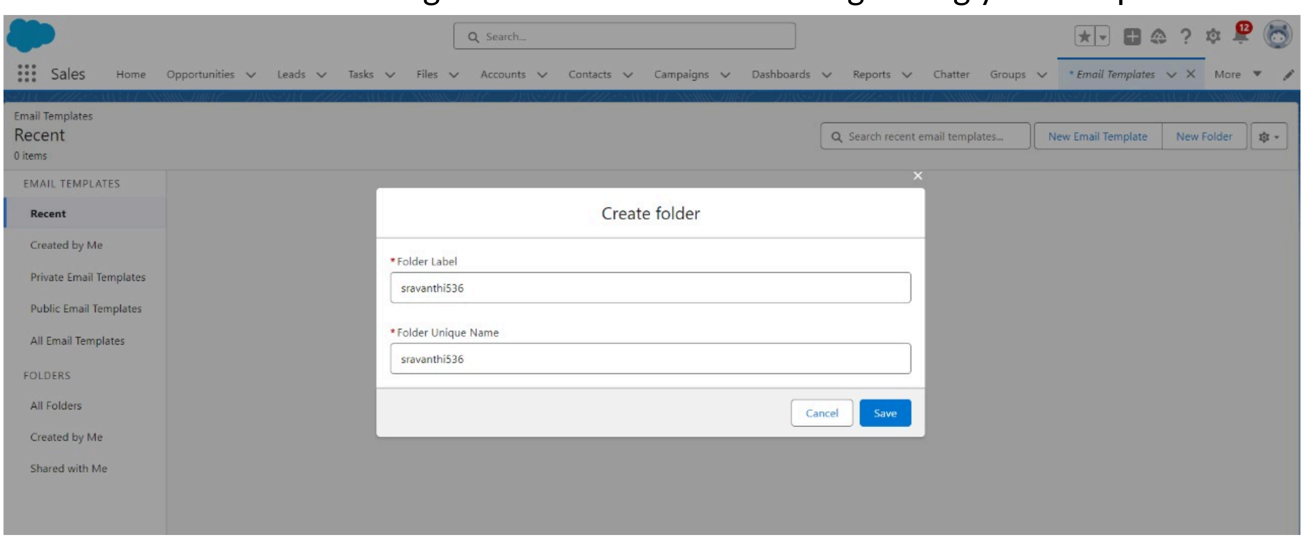
5.Create an Approval Process for Property Object

5.1 Create an Email Template

- Create an Email Template Folder:
- Go to Setup and enter "Templates" in the Quick Find box. Select "Lightning Email Templates."
- Toggle the option on if necessary, then go to the App Launcher and search for “Email Templates.”



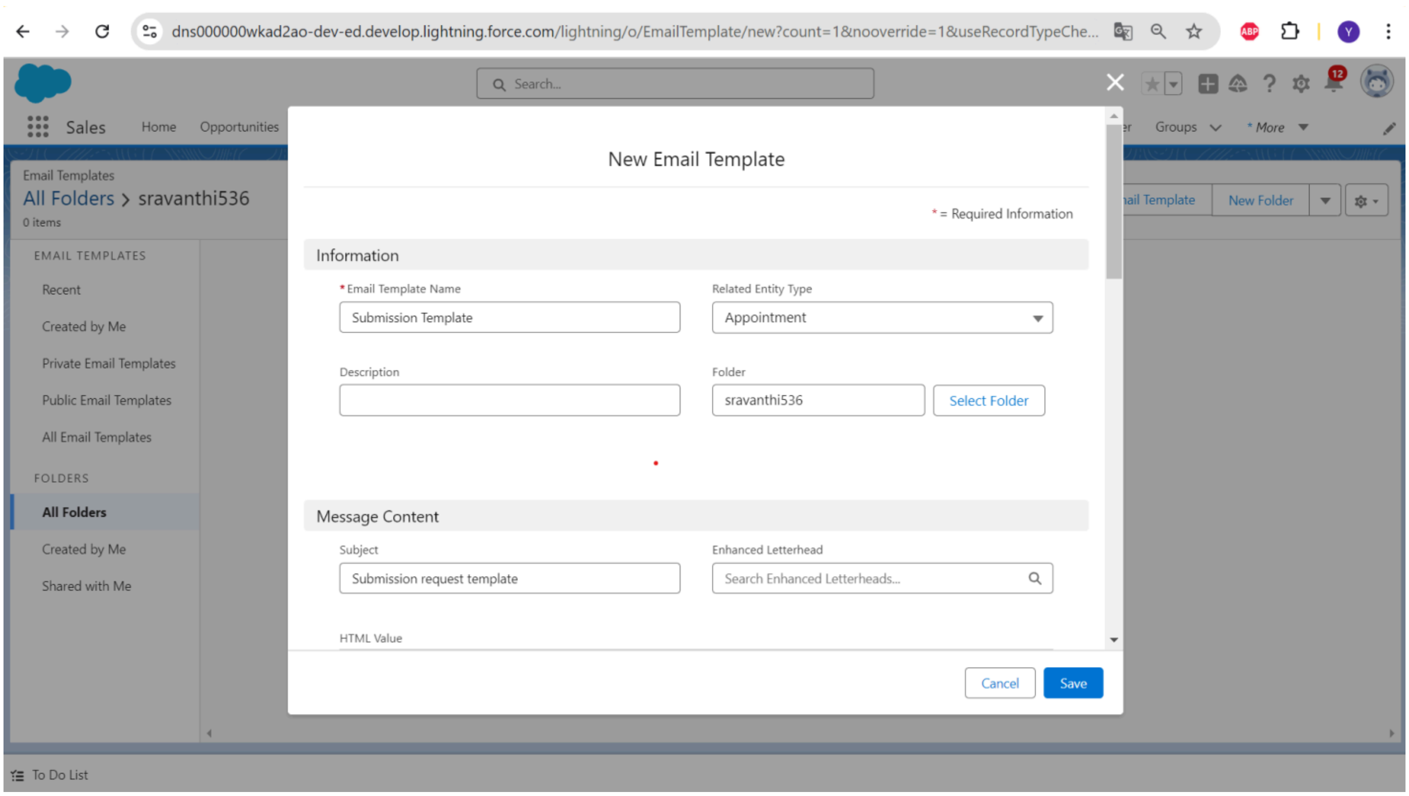
- Create a new folder and give it a desired name for organizing your templates.



- Click on "New Email Template."
- Select the folder you created earlier.
- Enter the following text in the HTML Value field:

"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 the email template with the name "Submission Template."



Create the Approval Template:

- Click on "New Email Template."
- Select the folder you created earlier.
- Enter the following text in the HTML Value field:

"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.

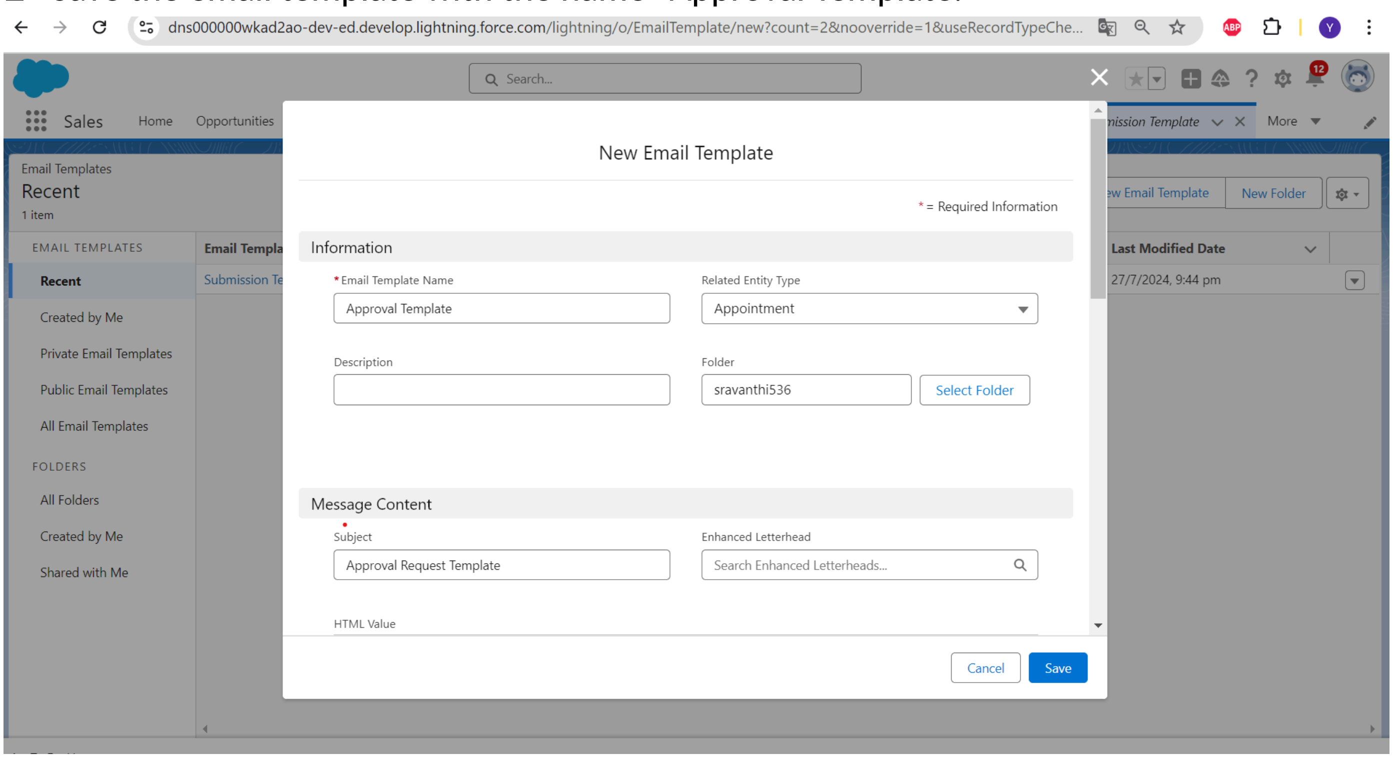
Looking forward to our meeting.

Best regards,

{{{Recipient.Name}}},

EduConsultantPro"

■ Save the email template with the name "Approval Template."

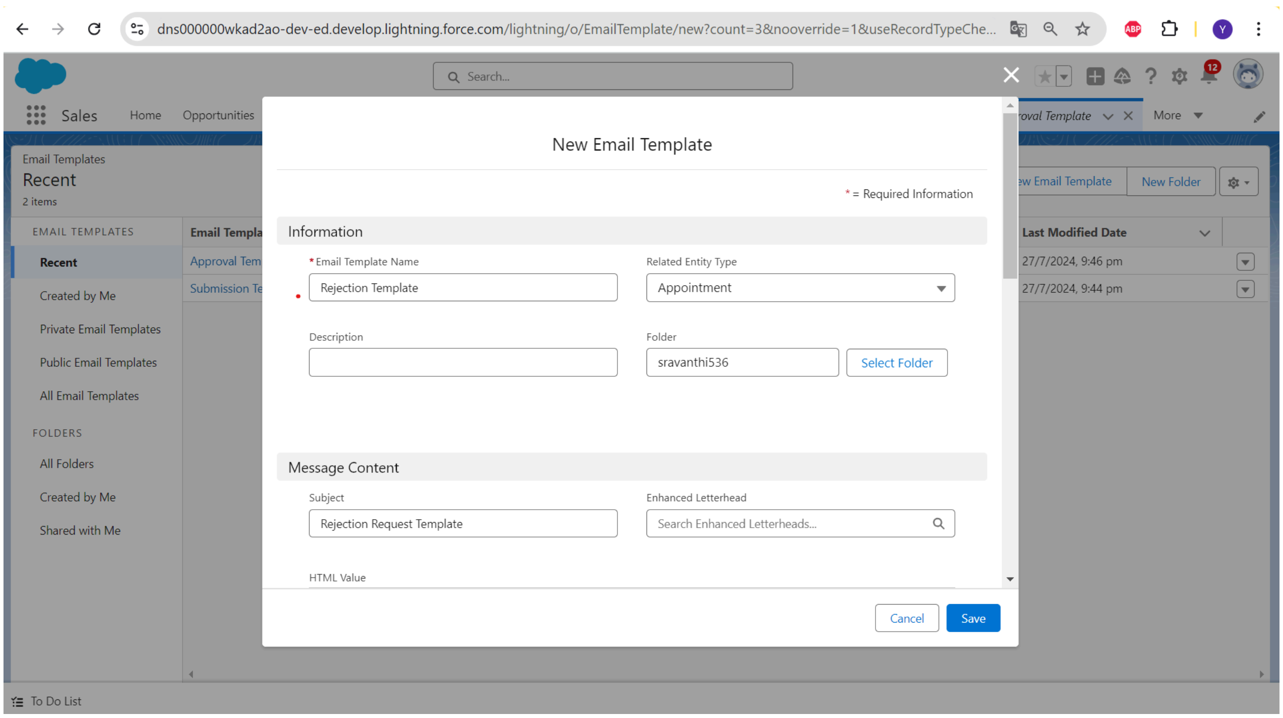


Create the Rejection Template:

- Click on "New Email Template."
- Select the folder you created earlier.
- Enter the following text in the HTML Value field:

"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 the email template with the name "Rejection Template."



5.2 Create an Approval Process

Navigate to Approval Processes:

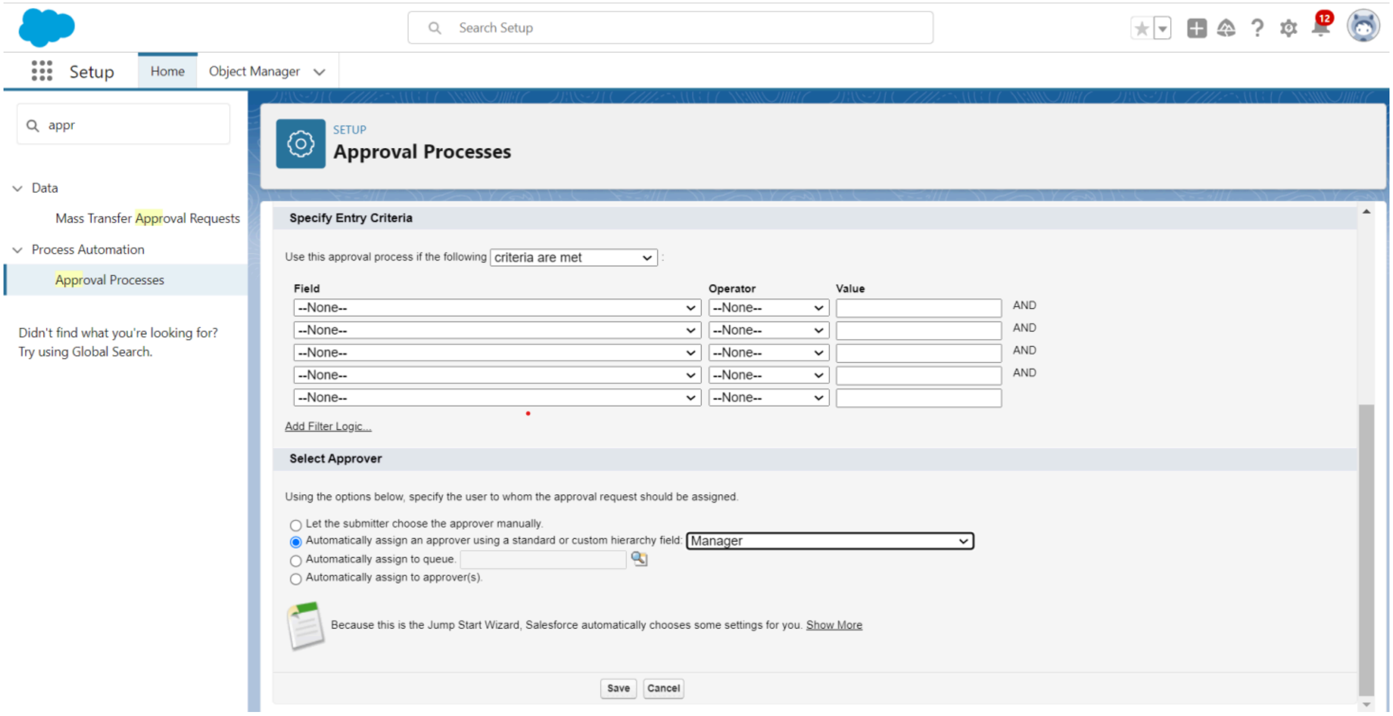
- Go to Setup.
- Enter "Approval" in the Quick Find box and select Approval Processes.

Create a New Approval Process:

- In the Manage Approval Processes For dropdown, select Appointment.
- Click Create New Approval Process and choose Use Jump Start Wizard.

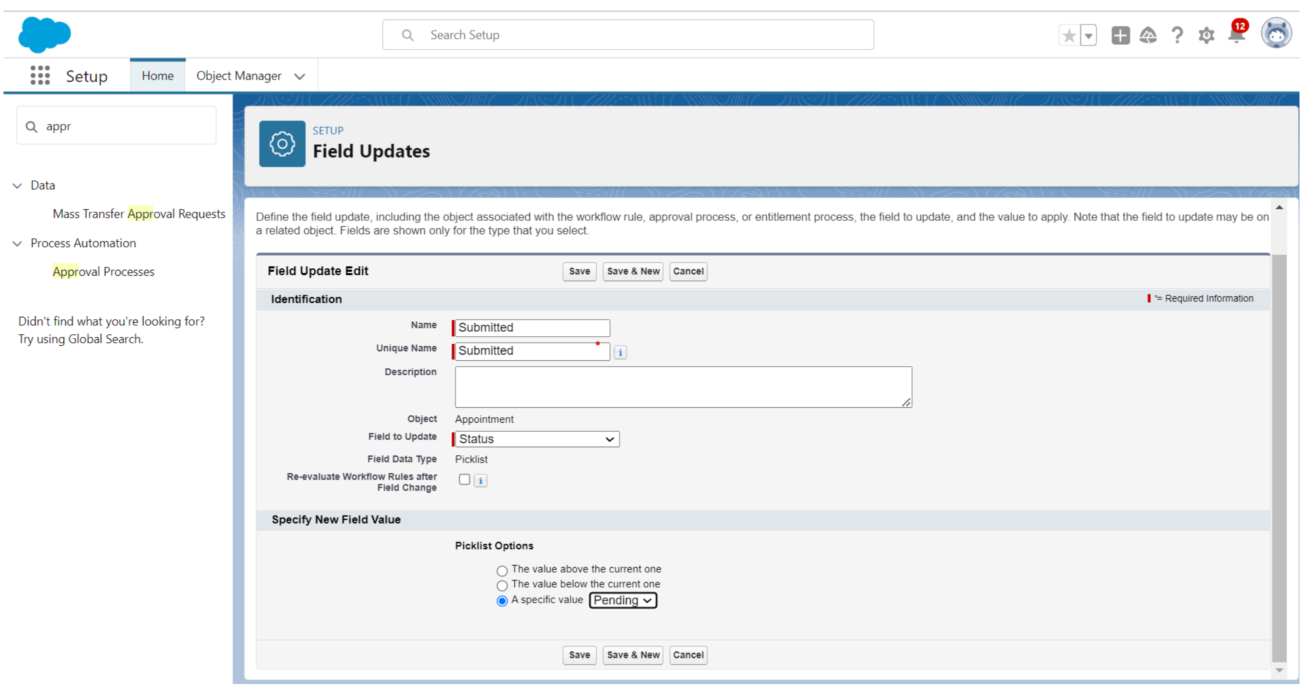
Approval Process:

- Process Name: Enter "Appointment Approval".
- Select Approver: Choose "Manager" and select the option “Automatically assign an approver using a standard or custom hierarchy field.”
- Click Next and choose Automated Approver Determined By as “Manager”.
- Under Record Editability Properties, select Administrators OR the currently assigned approver can edit records during the approval process.
- Click Save.
- Click View Approval Process Detail Page.



Initial Submission Actions:

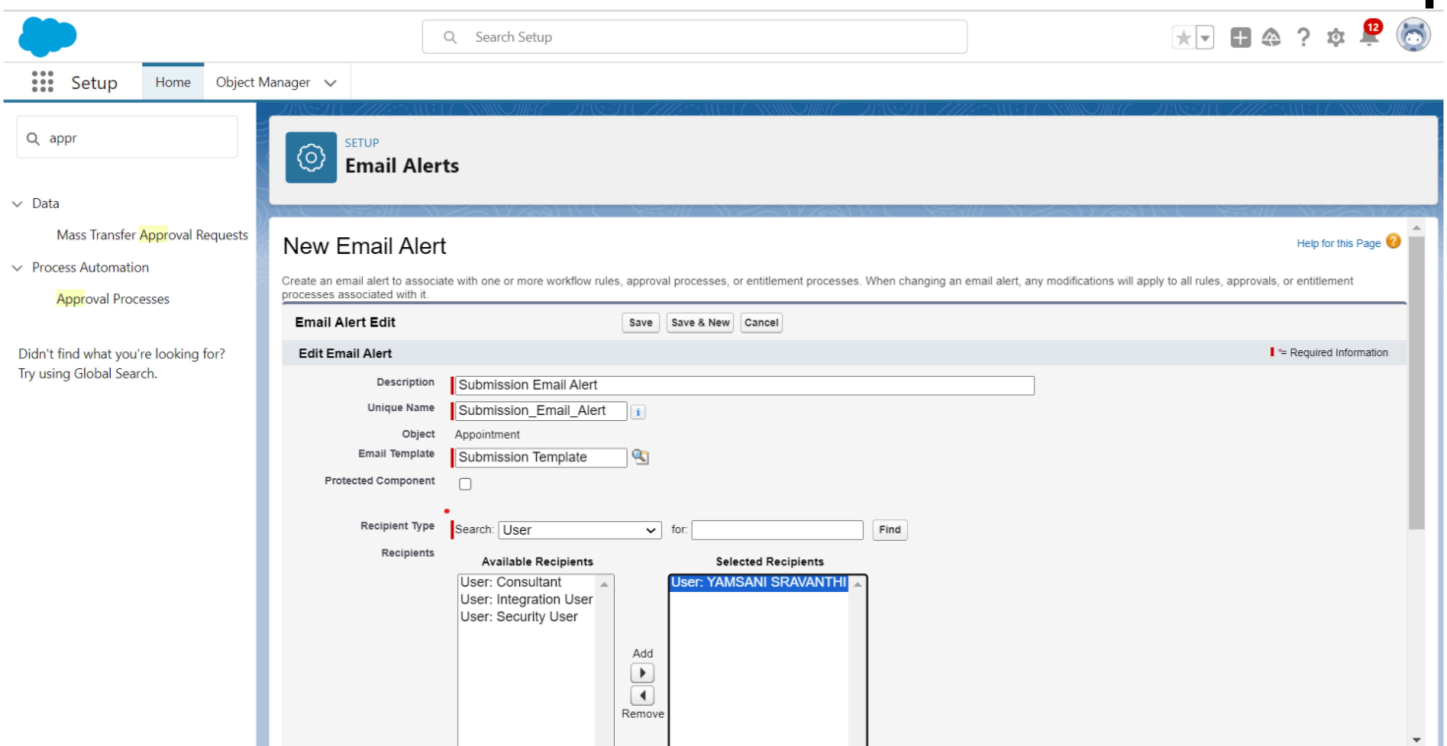
- Under Initial Submission Actions, click Add New and select Field Update.
- Configure the field update with the following values:
  - Name: Submitted
  - Field to Update: Appointment: Status
  - A Specific Value: Pending



Add Email Alert

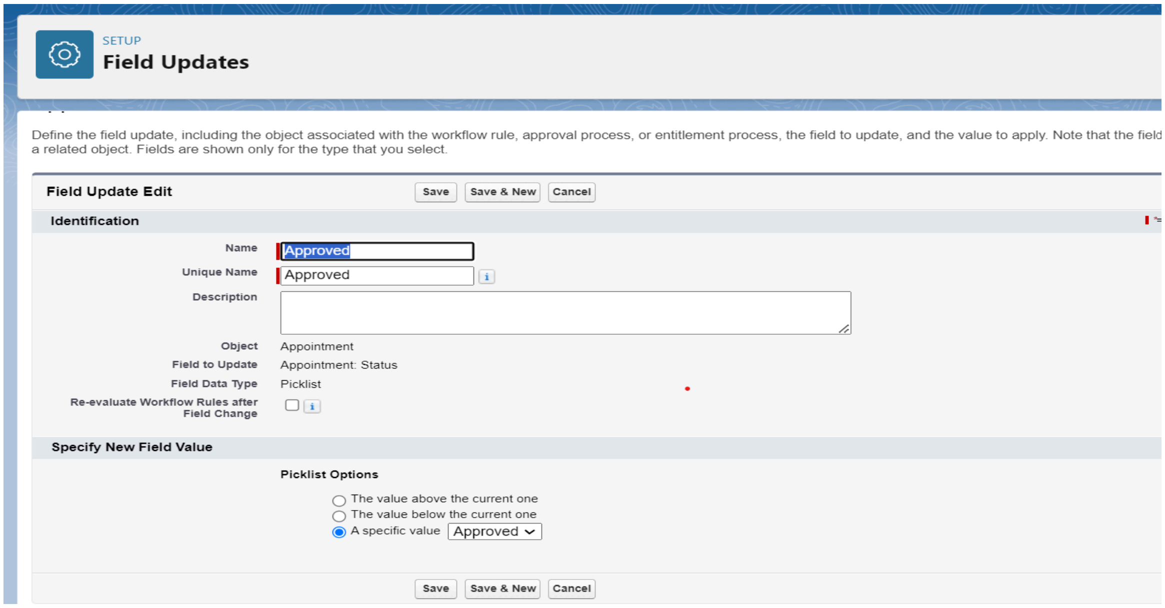
- Click Add New and select Email Alert.

- Configure the email alert with these values:
    - Description: Submission Email Alert
    - Unique Name: Auto Populates
    - Email Template: Submission Template
    - Recipient Type: Select your name



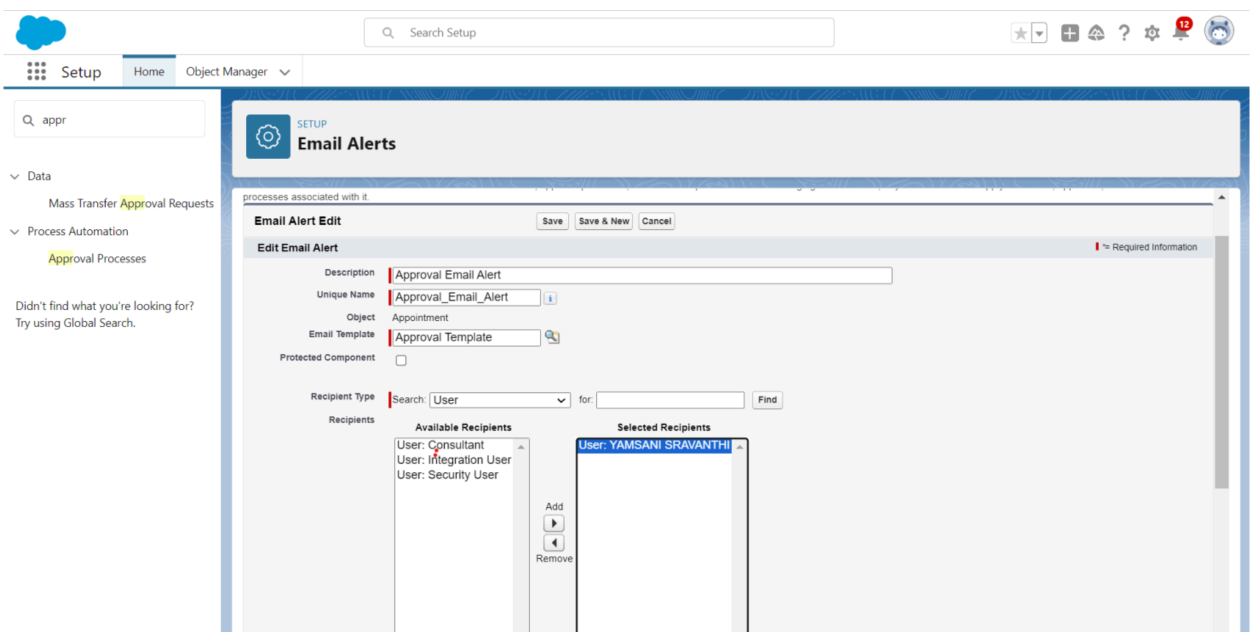
Final Approval Actions:

- Go to the Approval Process Detail Page for the Appointment Approval process.
- Scroll to the Final Approval Actions section.
- Click Add New and select Field Update.
- Configure the field update with these values:
    - Name: Approved
    - Field to Update: Appointment: Status
    - A Specific Value: Approved
- Click Save to apply the changes.



Add Email Alert

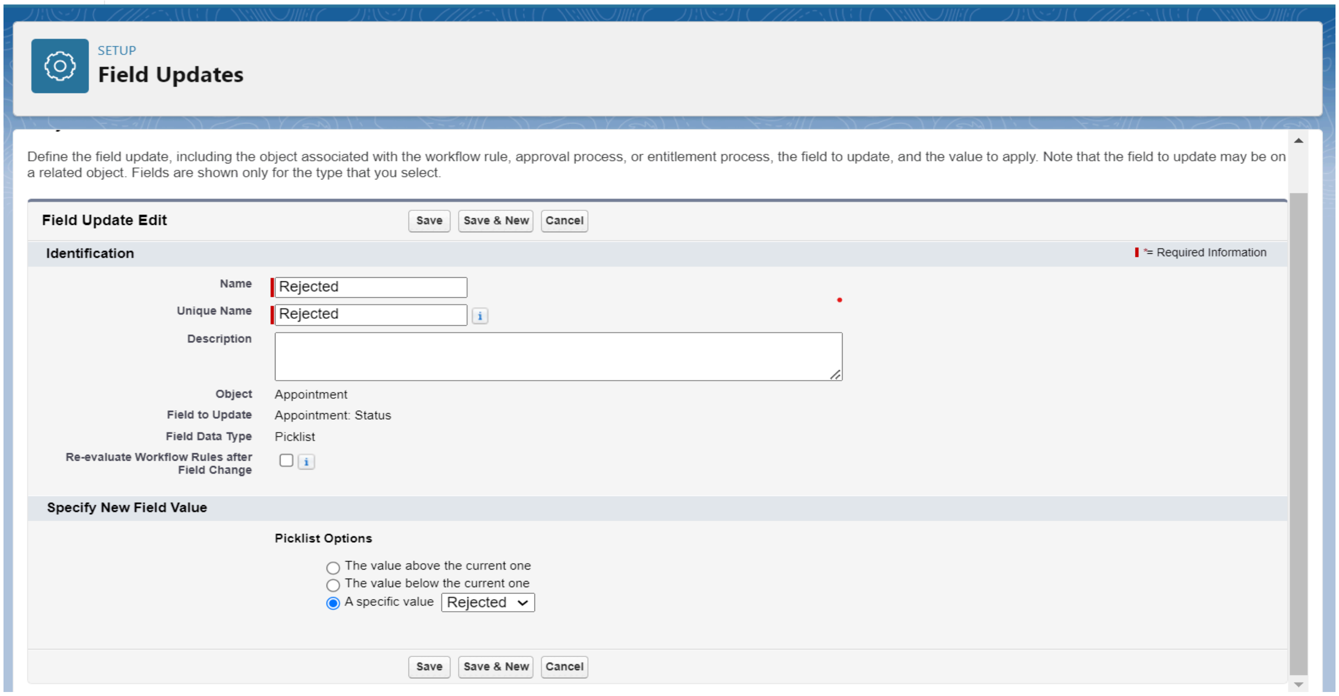
- Configure the email alert with these values:
  - Description: Approval Email Alert
  - Unique Name: Auto-populated
  - Email Template: Select or create an appropriate template for approval notifications (e.g., "Approval Notification Template").
  - Recipient Type: Select the recipient, such as the person who submitted the appointment or any relevant user.



Final Rejection Actions:

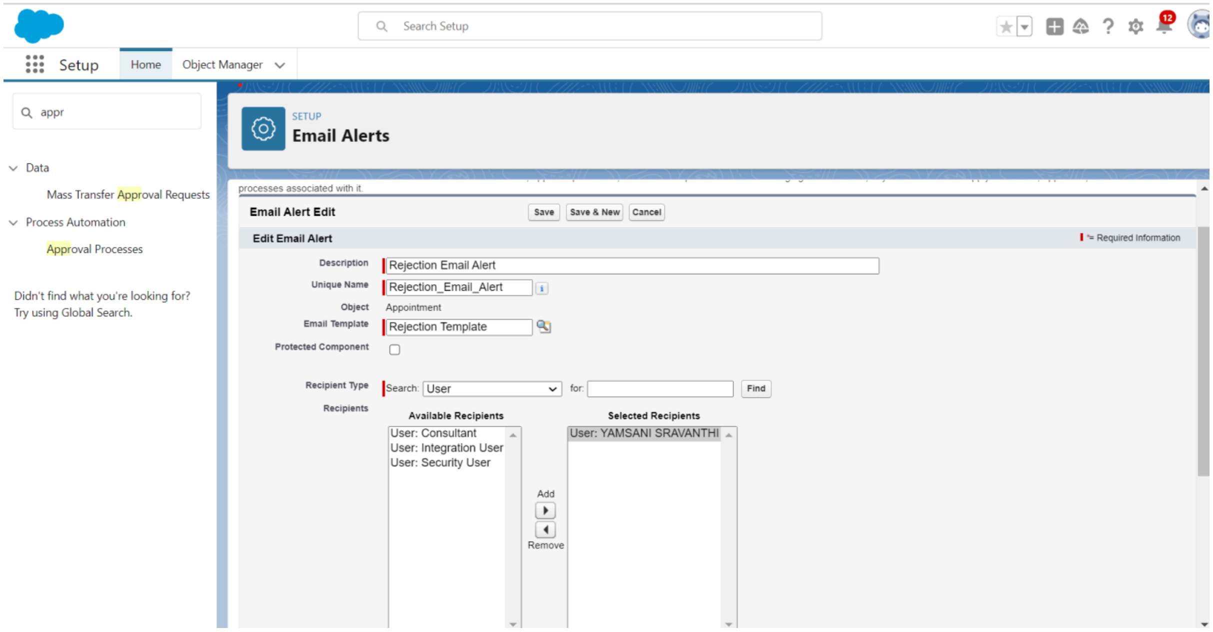
- Still on the Approval Process Detail Page, scroll to the Final Rejection Actions section.

- Click Add New and select Field Update.
- Configure the field update with these values:
    - Name: Rejected
    - Field to Update: Appointment: Status
    - A Specific Value: Rejected
- Click Save to apply the changes.



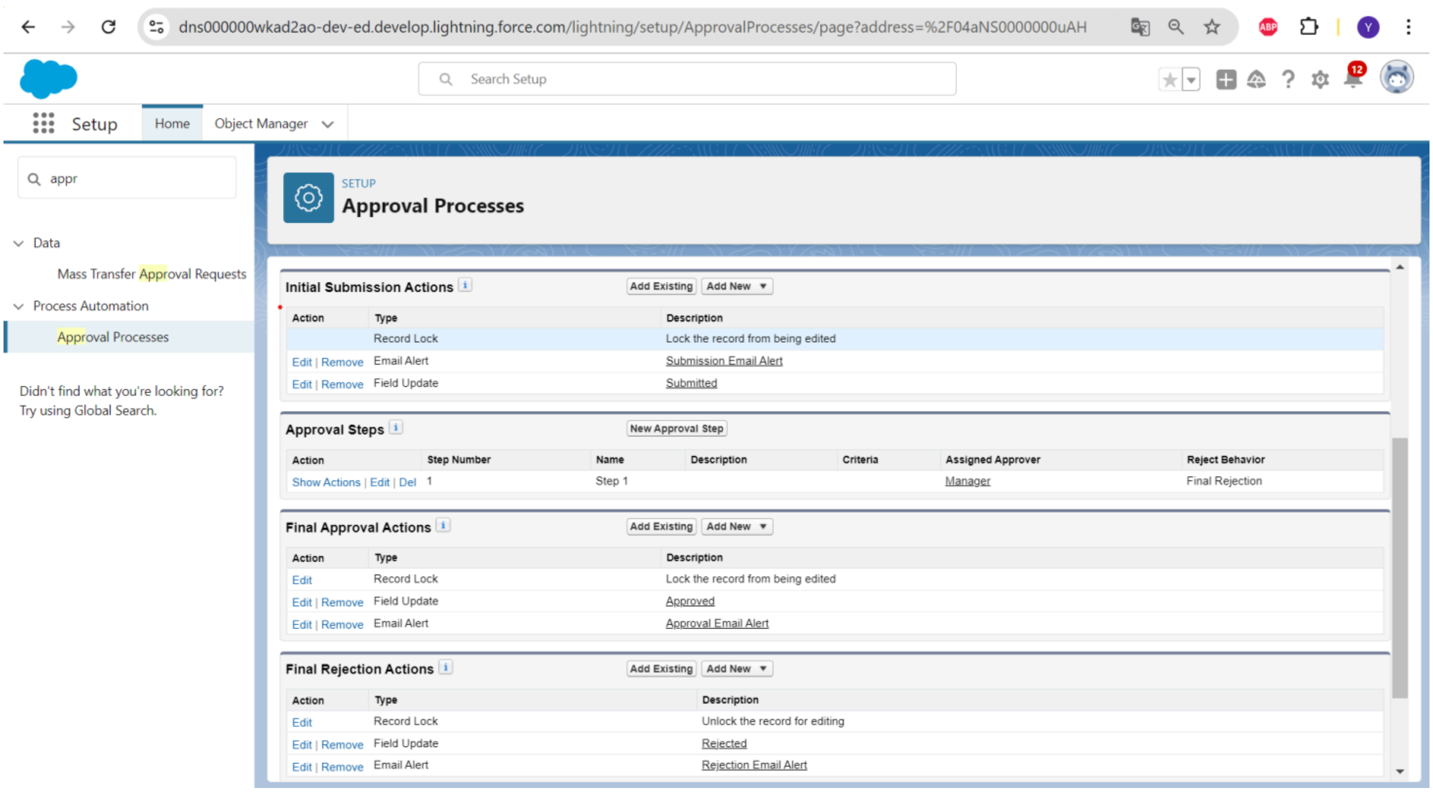
Add Email Alert.

- Configure the email alert with these values:
    - Description: Rejection Email Alert
    - Unique Name: Auto-populated
    - Email Template: Select or create an appropriate template for rejection notifications (e.g., "Rejection Notification Template").
    - Recipient Type: Select the recipient, such as the person who submitted the appointment or any relevant user.



Review and Save:

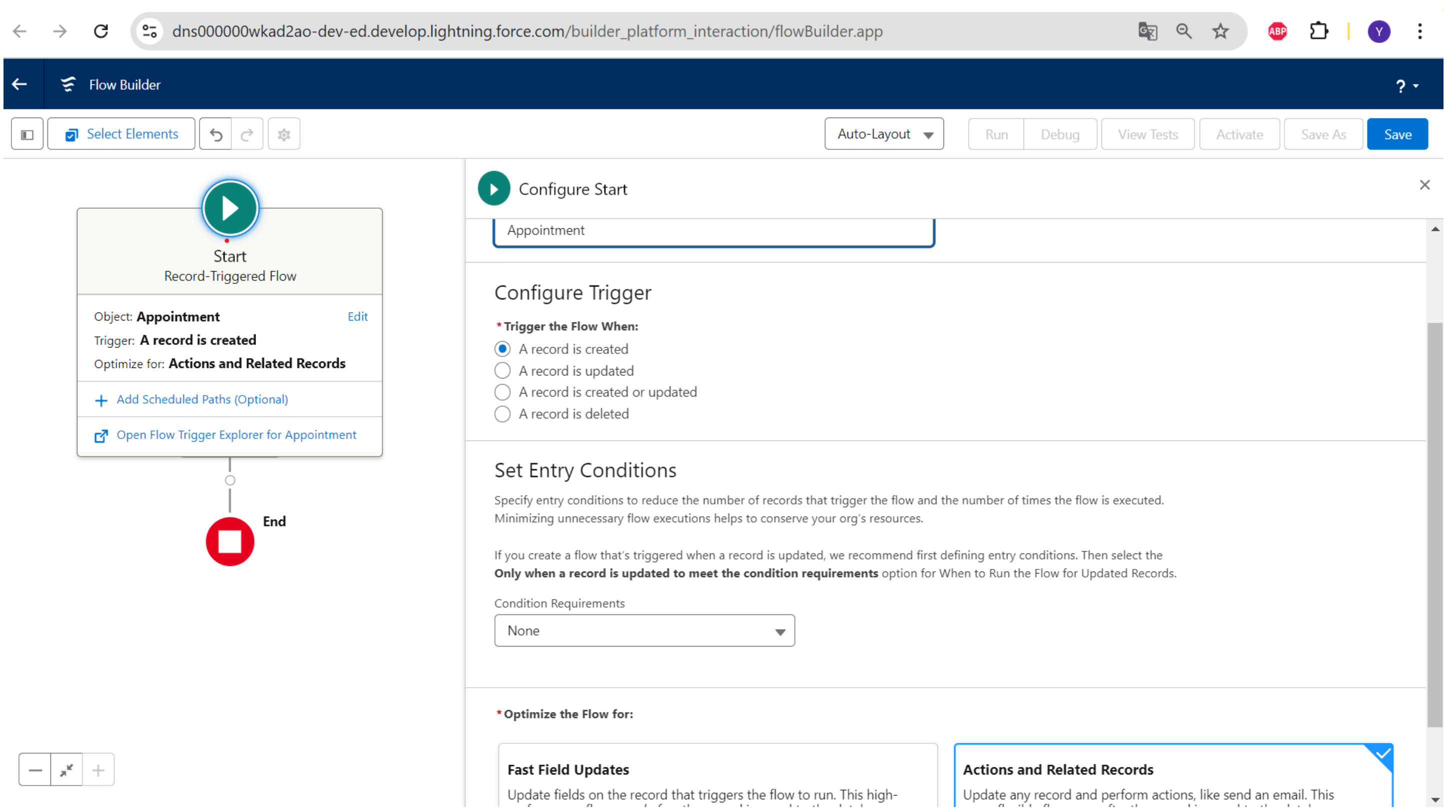
- Ensure that all configurations are correct for both the Final Approval and Final Rejection actions.
- Click Save to finalize these actions.
- By following these steps, you will have set up the necessary actions for handling final approval and rejection within your Salesforce approval process, ensuring that the status of appointments is updated appropriately and that relevant parties are notified via email.


dns000000wkad2ao-dev-ed.develop.lightning.force.com/lightning/setup/ApprovalProcesses/page?address=%2F04aNS0000000uAH
Search Setup
Setup
Home
Object Manager
appr
Data
Mass Transfer Approval Requests
Process Automation
Approval Processes
Didn't find what you're looking for?
Try using Global Search.
SETUP
Approval Processes
Initial Submission Actions
Add Existing
Add New
Action Type Description
Record Lock Lock the record from being edited
Edit | Remove Email Alert Submission Email Alert
Edit | Remove Field Update Submitted
Approval Steps
New Approval Step
Action Step Number Name Description Criteria Assigned Approver Reject Behavior
Show Actions | Edit | Del 1 Step 1 Manager Final Rejection
Final Approval Actions
Add Existing
Add New
Action Type Description
Edit Record Lock Lock the record from being edited
Edit | Remove Field Update Approved
Edit | Remove Email Alert Approval Email Alert
Final Rejection Actions
Add Existing
Add New
Action Type Description
Edit Record Lock Unlock the record for editing
Edit | Remove Field Update Rejected
Edit | Remove Email Alert Rejection Email Alert

6.Create a Record TriggererFlow

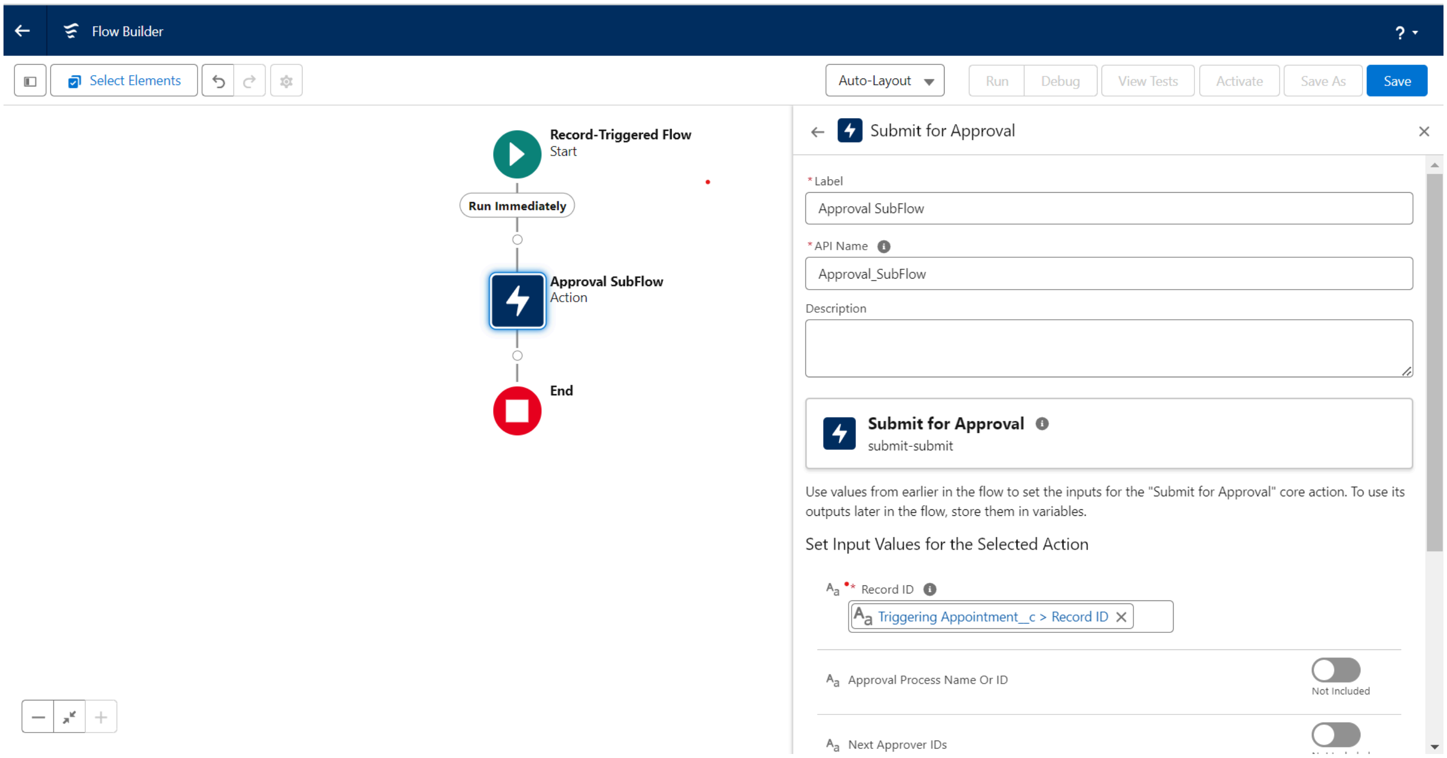
6.1 Configure the Start Element

- Go to Setup and enter "Flows" in the Quick Find box. Select Flows.
- Click New Flow and choose Record-Triggered Flow. Click Create to open the Configure Start window.
- For Object, select Appointment.
- For Trigger the Flow When, select A record is created.
- The flow setup will now be configured to trigger whenever a new Appointment record is created. The flow diagram should reflect the start element with these settings.



6.2 Add an Action Element

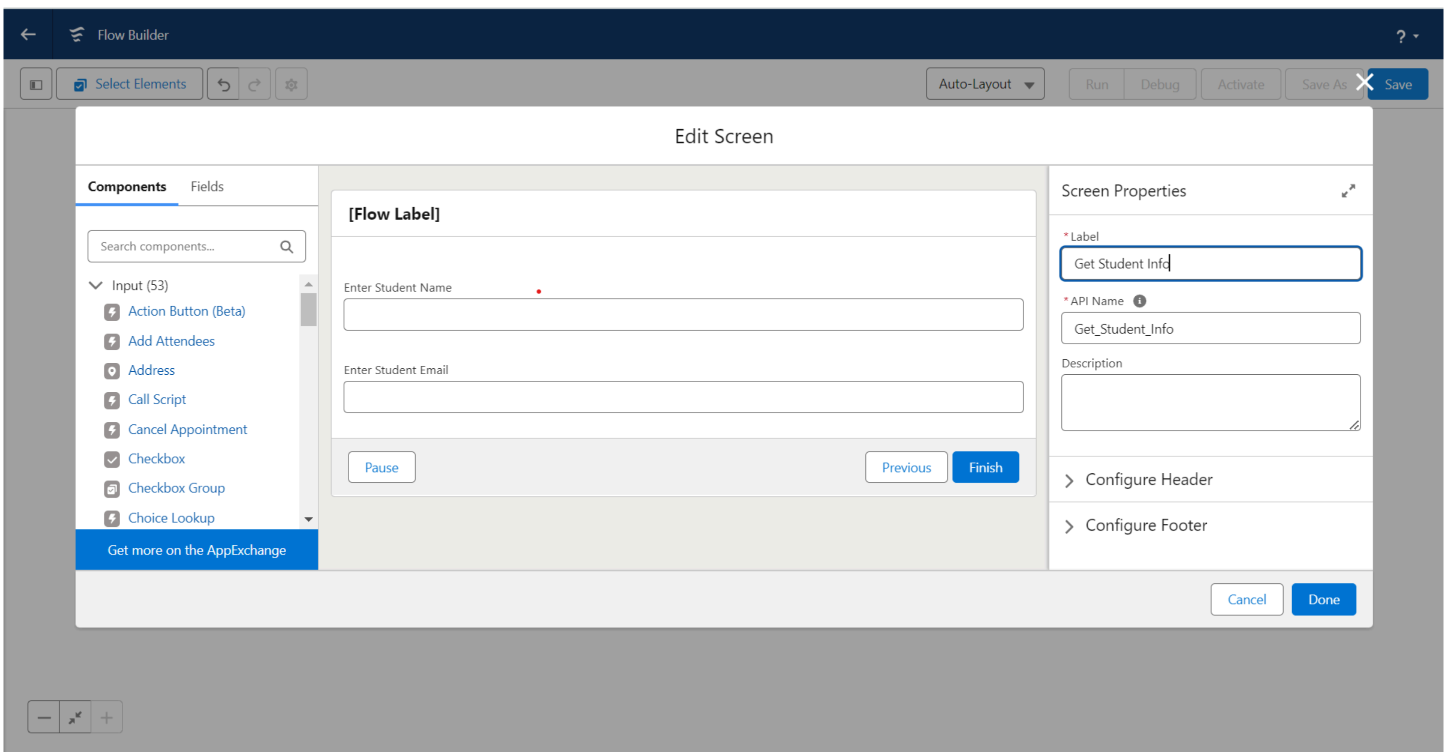
- Add an Action element after the Start element and select the Submit for Approval action. Label it as “Approval SubFlow.”
- Set the RecordId to {!$Record.Id}.
- Save the flow with the label "EduConsultPro Approval Flow" and click Activate.



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

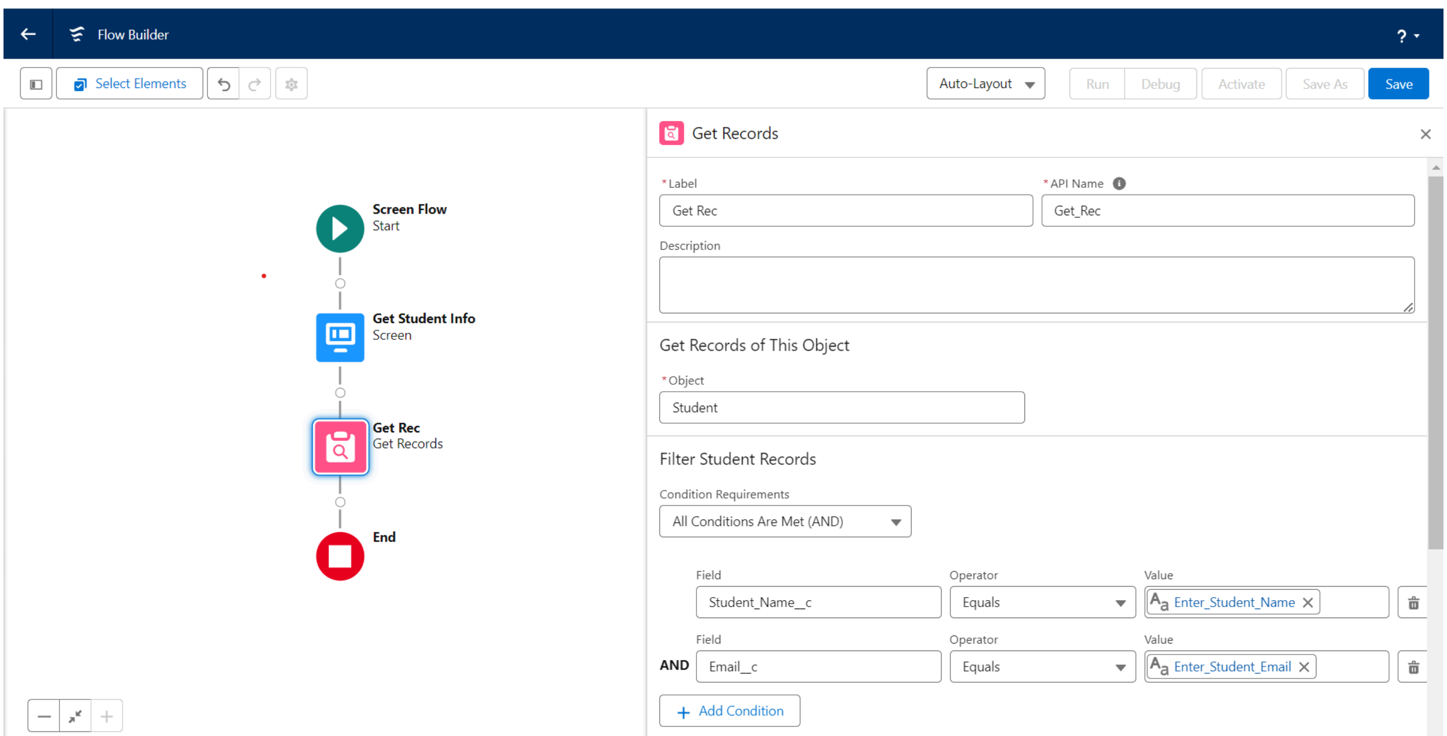
7.1 Add an Screen Element

- From Setup, enter "Flow Builder" in the Quick Find box and select New Flow. Choose Screen Flow.
- Add a Screen element.
- In the Screen Properties pane, for Label, enter “Get Student Info.”
- From the left side panel, add two Text components to the screen:
- Label the first Text component as “Enter Student Name.”
- Label the second Text component as “Enter Student Email".
- Click “Done”



7.2 Add GET Record Element

- Add a GET Record element and label it as “Get Rec.”
  - Select Object: Student.
  - For Condition Requirement, choose All Conditions are Met (AND).
- Set the conditions as follows:
  - Field: Student Name
  - Operator: Equals
  - Value: {!Enter_Student_Name}
  - Field: Email__c
  - Operator: Equals
  - Value: {!Enter_Student_Email}



7.3 Add an Screen Element

- From Setup, enter "Flow Builder" in the Quick Find box and select New Flow.
- Choose Screen Flow and click Create to start designing the flow.
- Drag and drop a Screen element onto the flow canvas.
- In the Screen Properties pane, set the Label to “Display Student Details.”

- From the left side panel, add a Display Text component to the screen.
- Set the API Name to “Display_details.”
- In the Resource Picker, input the following text to display student information:

Name : {!Get_Rec.Name},

First Name : {!Get_Rec.First_Name__c},

Last Name : {!Get_Rec.Last_Name__c},

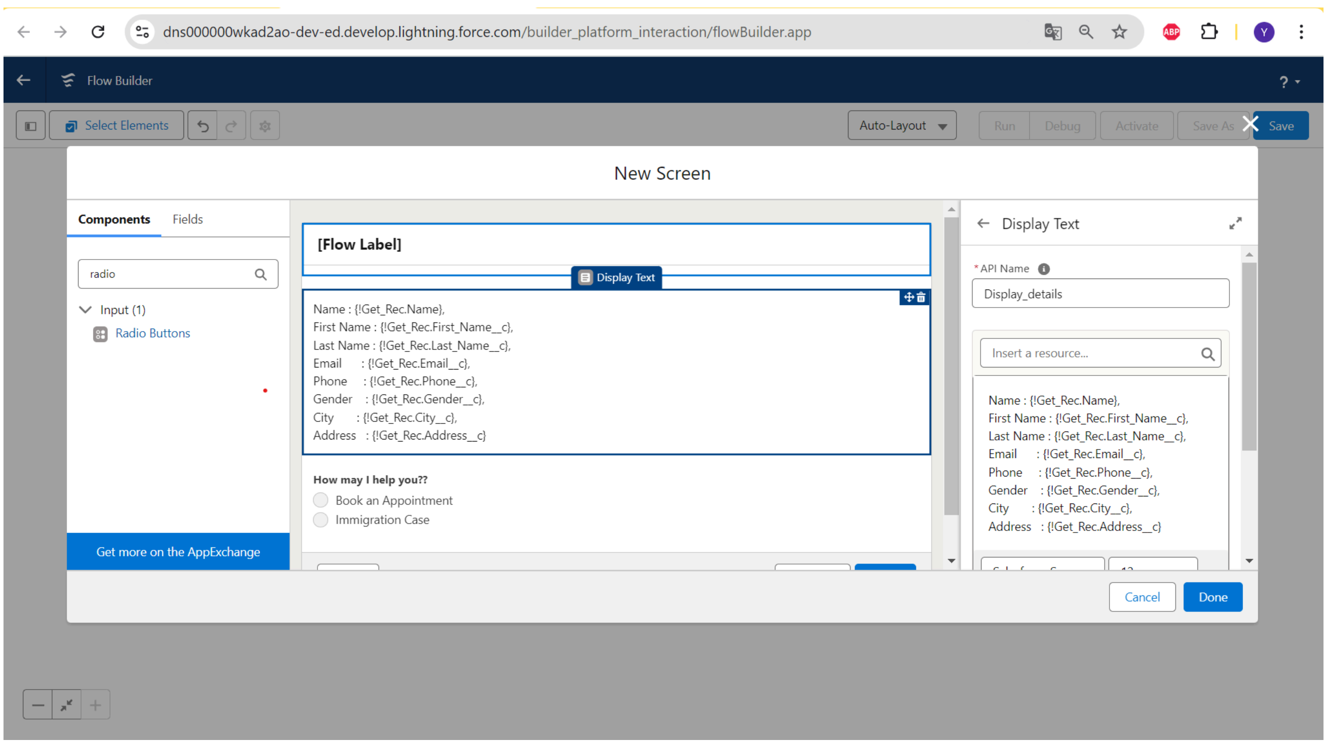
Email : {!Get_Rec.Email__c},

Phone : {!Get_Rec.Phone__c},

Gender : {!Get_Rec.Gender__c},

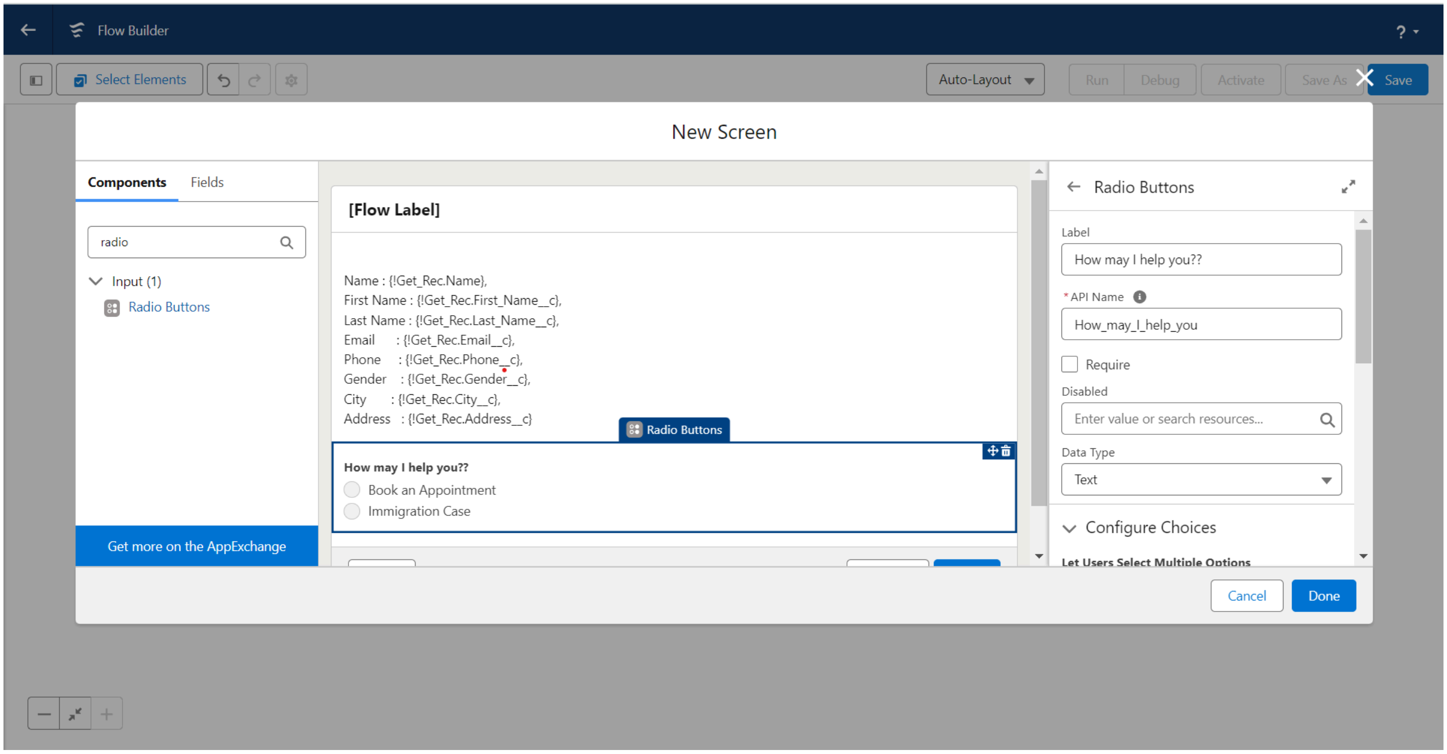
City : {!Get_Rec.City__c},

Address : {!Get_Rec.Address__c}



- Drag and drop a Radio Button component from the left side panel onto the screen.
- Label the component as “How may I help you?”
- Click Add Choice to create a new option.
- Enter “Book an Appointment” in the input field and click Create to add this choice.
- Repeat the above step to create another choice:
- Enter “Immigration Case” in the input field and click Create to add this choice.
- Review the configuration of the screen elements to ensure all fields and choices are correctly set up.

- Click Done to save the screen element.Save the flow and proceed to configure additional elements or actions as required.

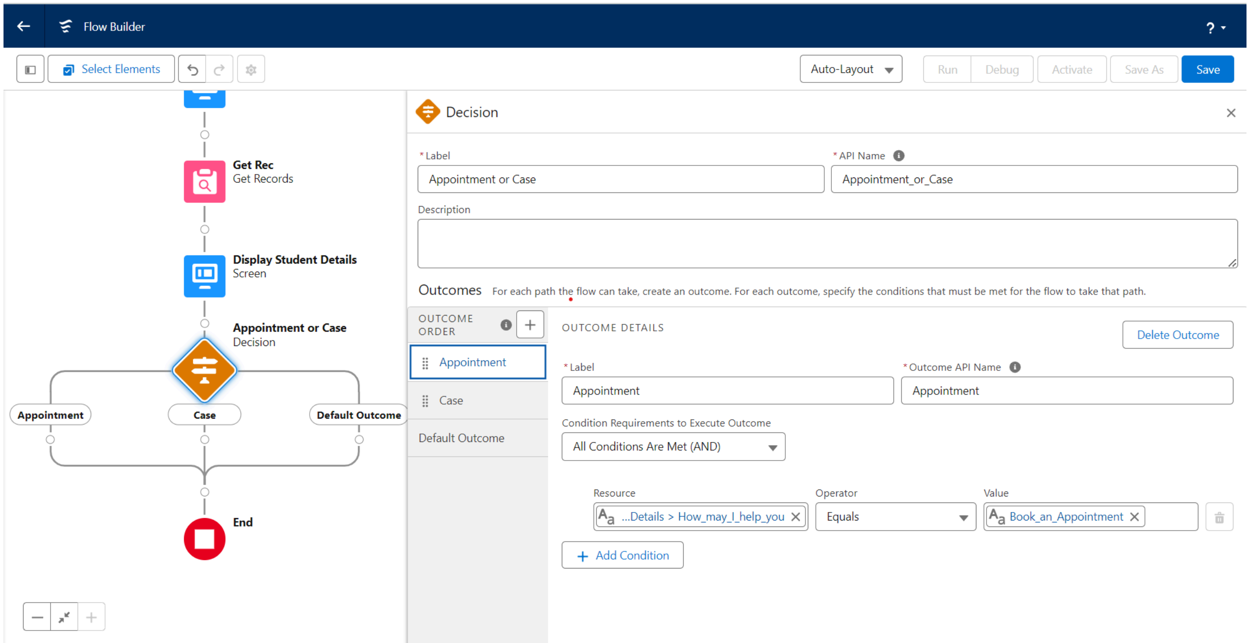


7.4 Add Decision Element

- create Decision element for Displaying Student Details screen element.
- Label the decision element as “Appointment or Case.”

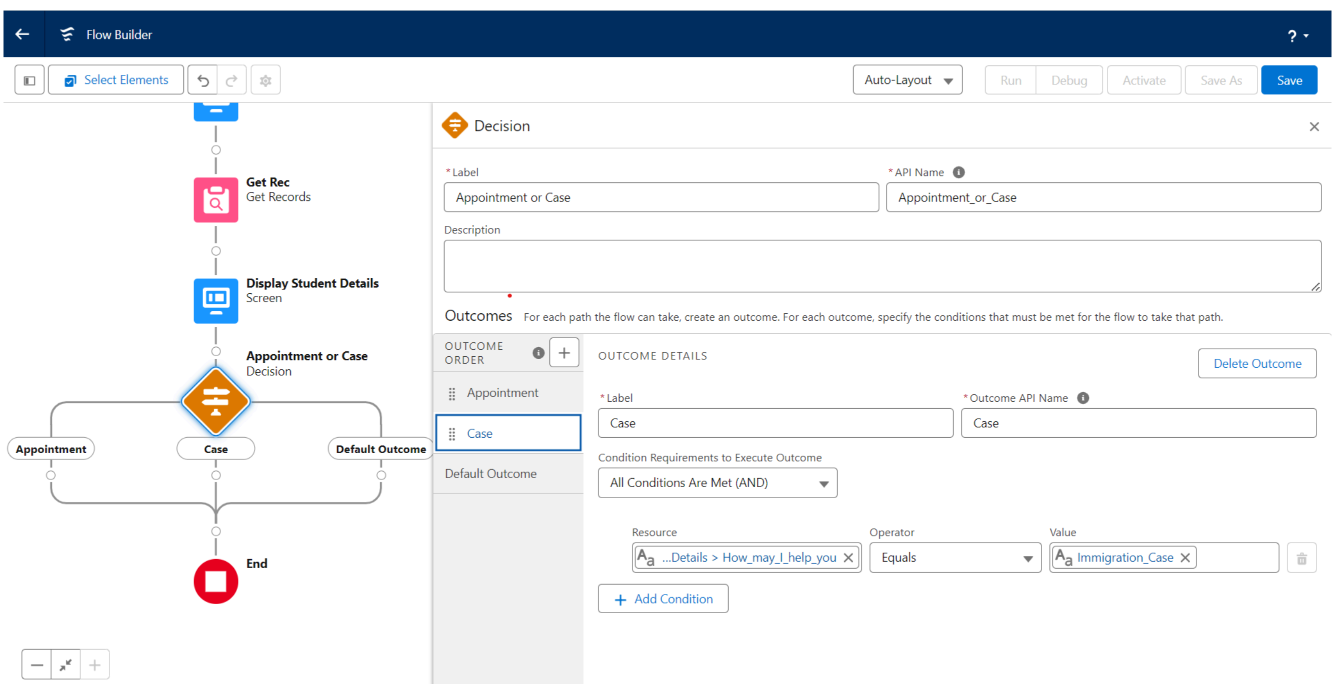
Outcome for Appointment:

  - Under the Outcome section, click Add Outcome and label it as “Appointment.”
  - Set the condition as follows:
    - Resource: {!How_may_I_Help_you}
    - Operator: Equals
- Value: {!Book_an_Appointment}



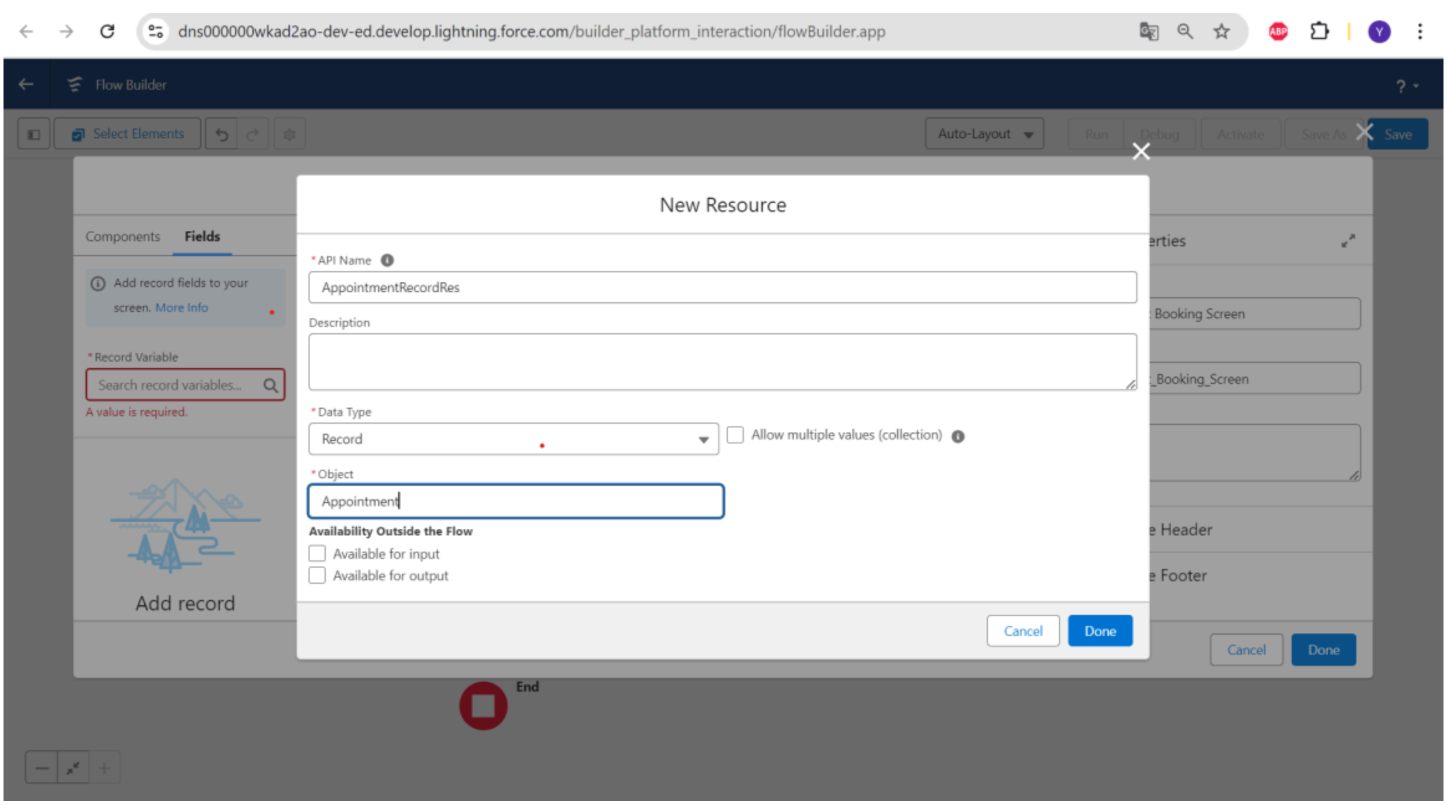
Add Outcome for Immigration Case:

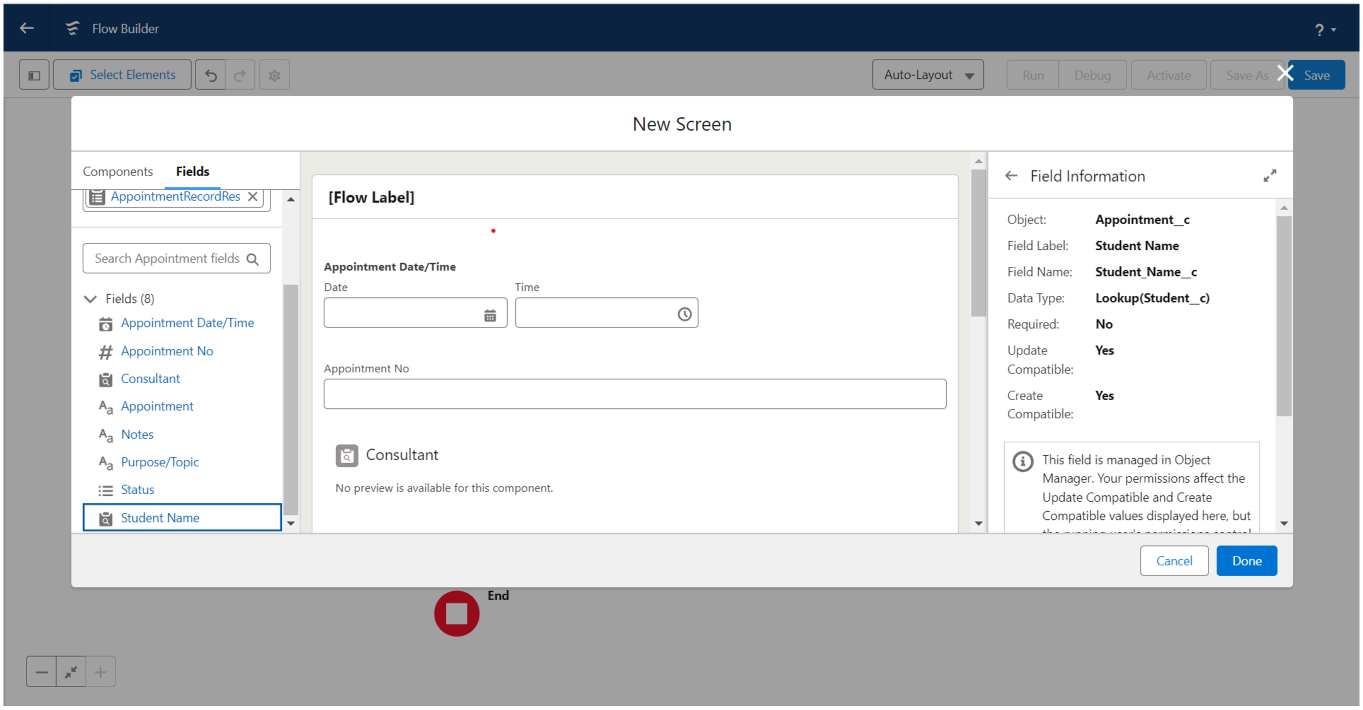
- Click the “+” icon to add another outcome.
- Label the new outcome as “Immigration Case.”
- Set the condition as follows:
  - Resource: {!How_may_I_Help_you}
  - Operator: Equals
  - Value: {!Immigration_Case}



7.5 Add Screen Element

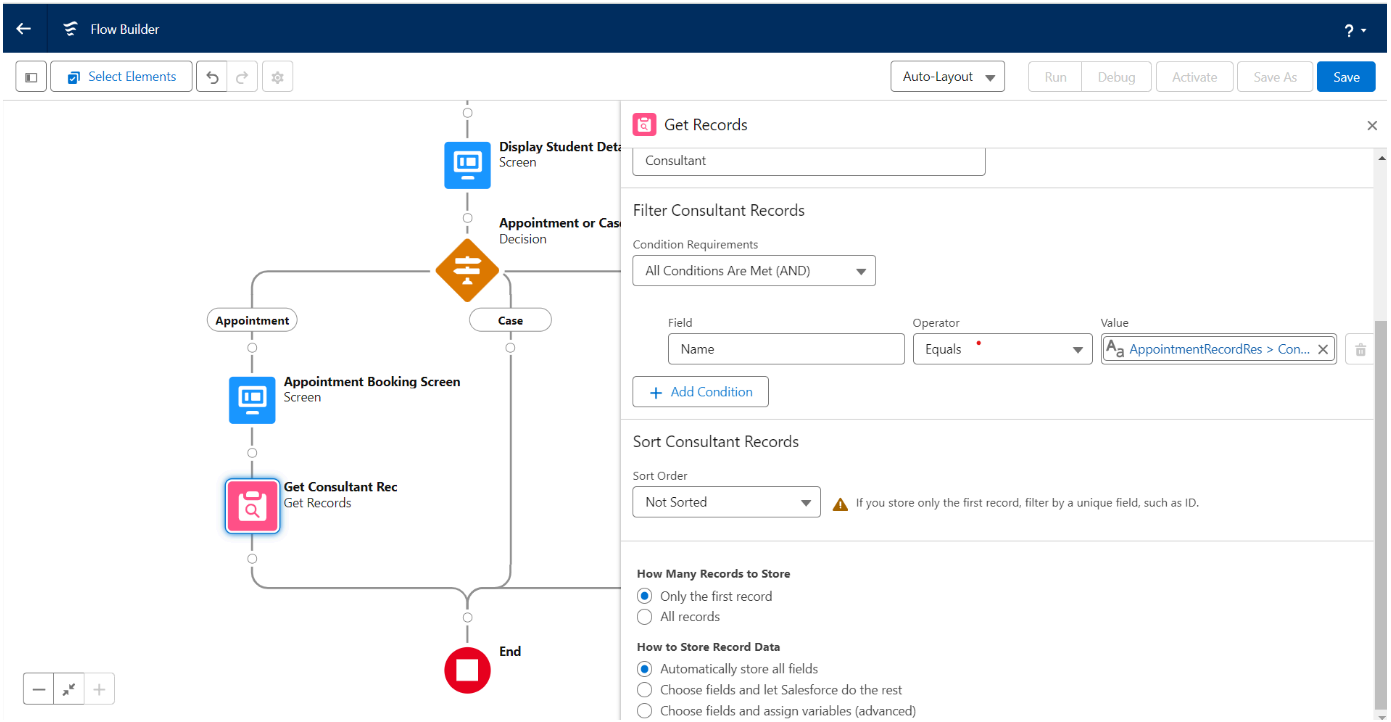
- Add a Screen element after the Decision element.
- Label the screen element as “Appointment Booking Screen.”
- Click on Fields in the left side panel.
- Click on the Record Variable input and create a new resource.
- Set Resource Type to Record.
- Select Appointment as the Object.
- Set the API Name to AppointmentRecordRes.
- Drag necessary fields from the Appointment object to the screen:Appointment Date, Appointment Time,Purpose of Appointment,Consultant Name and Any other relevant fields
- Click Done to save the screen element configuration.
- Verify that all fields display correctly on the “Appointment Booking Screen.”
- Ensure fields are properly aligned and user-friendly for data entry.





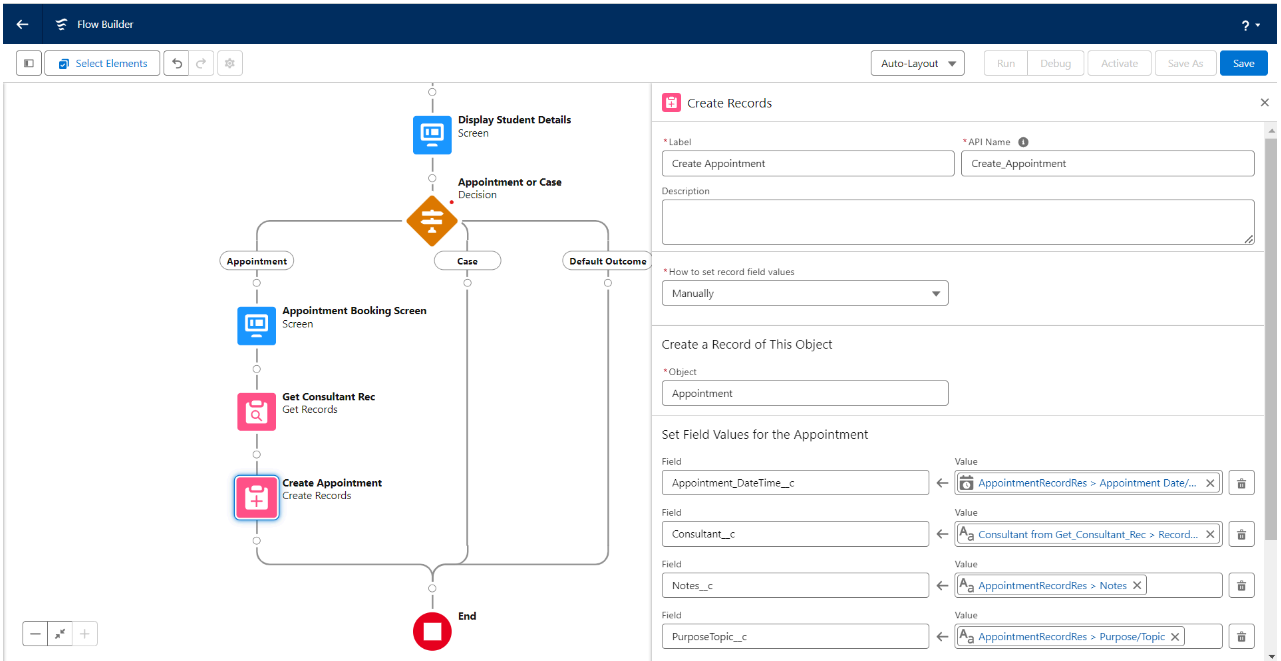
7.6 Add GET Record Element

- Add a GET Record element after the Decision element under the Appointment path.
- Label the GET Record element as “Get Consultant Rec.”
- Select Object: Consultant.
- Set Condition Requirement to: All Conditions are Met (AND).
- Add the field condition:
- Field: Name
- Operator: Equals
- Value: {!AppointmentRecordRes.Consultant_Name__c}
- Click Done to save the GET Record element configuration.



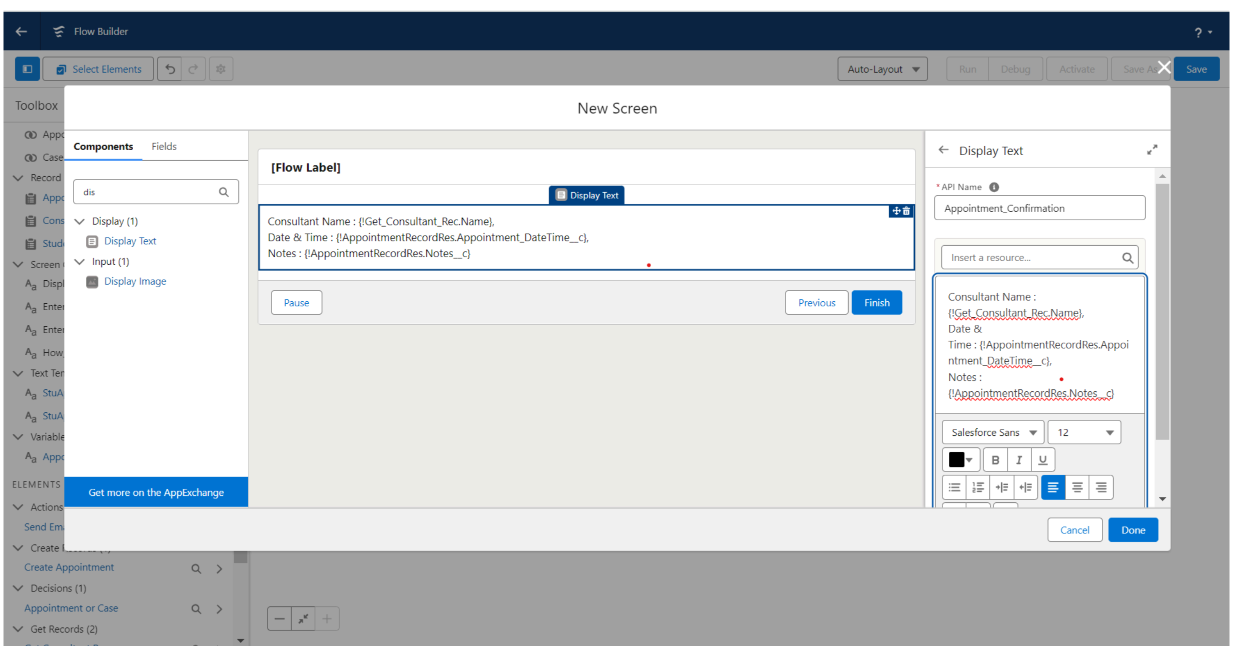
7.7 <u>Create Appointment Record using Create Records Element</u>

- Add a Create element after the Get Consultant Rec element and label it as "Create Appointment."
- Select "manually" under How to Set the record fields.
- Select Object: Appointment.
- Set the field Appointment_DateTime__c to value {!AppointmentRecordRes.Appointment_DateTime__c}.
- Set the field Consultant__c to value {!Get_Consultant_Rec.Id}.
- Set the field Notes__c to value {!AppointmentRecordRes.Notes__c}.
- Set the field PurposeTopic__c to value {!AppointmentRecordRes.PurposeTopic__c}.
- Set the field Student_Name__c to value {!Get_Rec.Id}



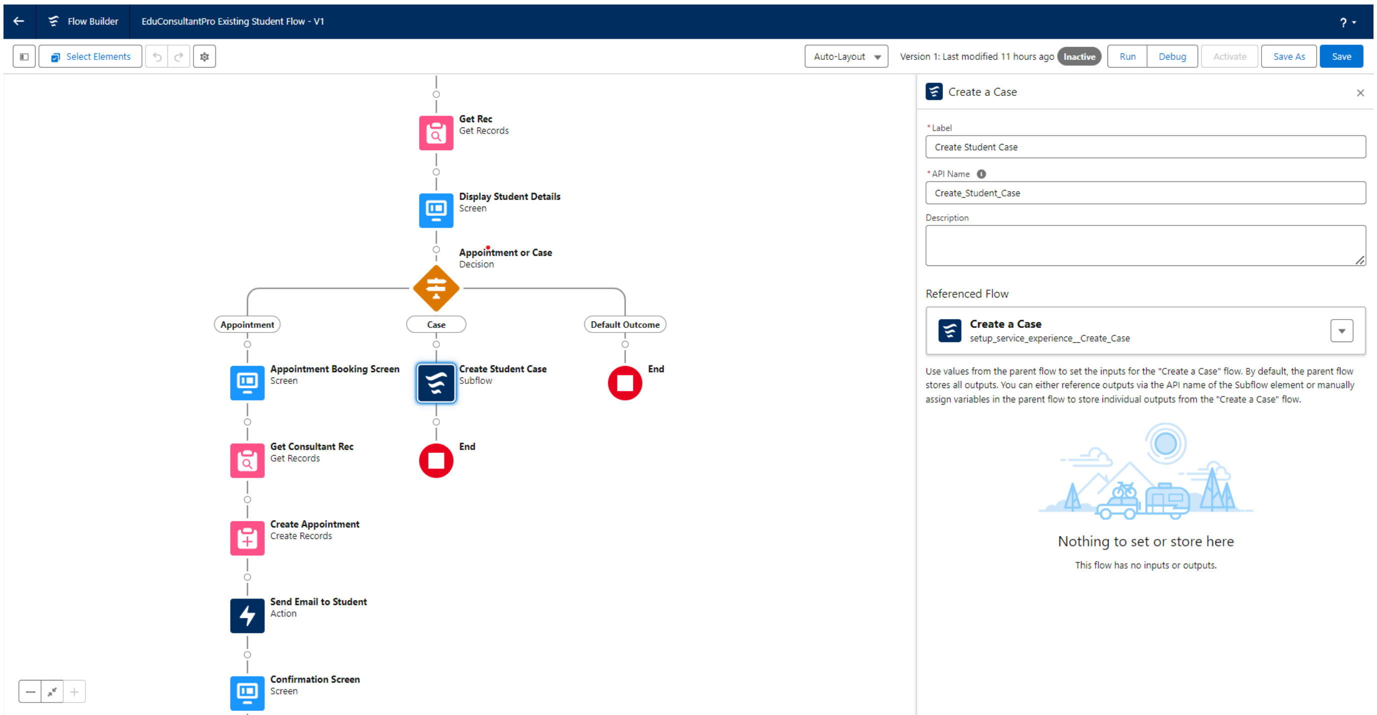
7.8 Add Screen Element

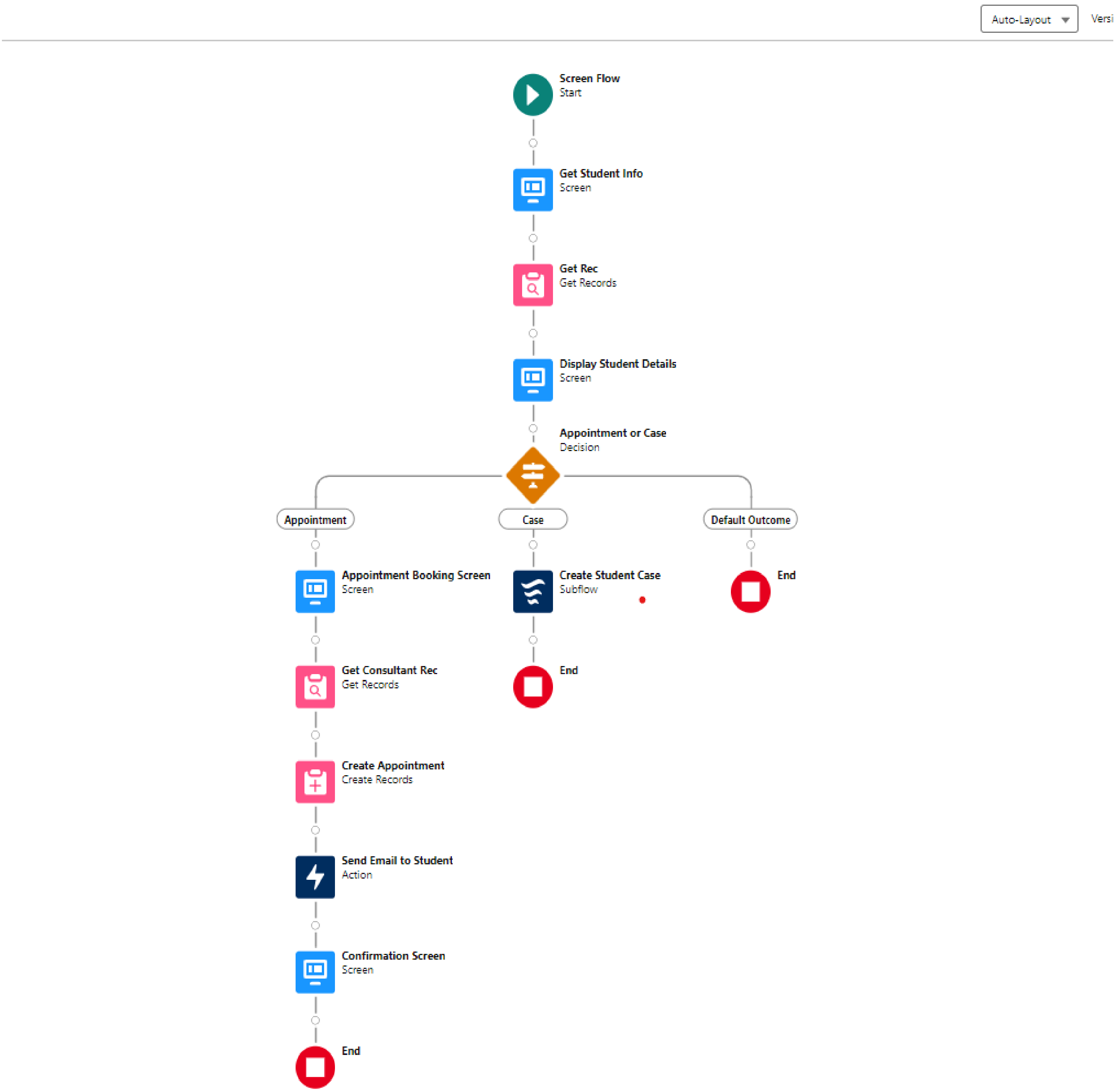
- Add a Screen Element after the Send Email to Student Action Element.
- Label the Screen Element as “Confirmation Screen.”
- From the left side panel, search for the Display Text component.
- Drag the Display Text component to the main panel.
- Label the Display Text component as “Appointment_Confirmation.”
- In the Resource picker box, paste the following text
- Click Done to save



7.9 Add an SubFlow Element

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




Auto-Layout
Versi
Screen Flow
Start
Get Student Info
Screen
Get Rec
Get Records
Display Student Details
Screen
Appointment or Case
Decision
Appointment
Case
Default Outcome
Appointment Booking Screen
Screen
Create Student Case
Subflow
End
Get Consultant Rec
Get Records
End
Create Appointment
Create Records
Send Email to Student
Action
Confirmation Screen
Screen
End

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

8.1 Add Screen Element

- Add a Screen Element and label it as "Welcome Screen."
- From the left side panel, search for the Display Text component.
- Drag the Display Text component to the main panel.
- Label the Display Text component as “SuccessMessage.”
- Paste the following text in the Resource picker box:

“Welcome to EduConsultantPro

your premier destination for education and immigration solutions!

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

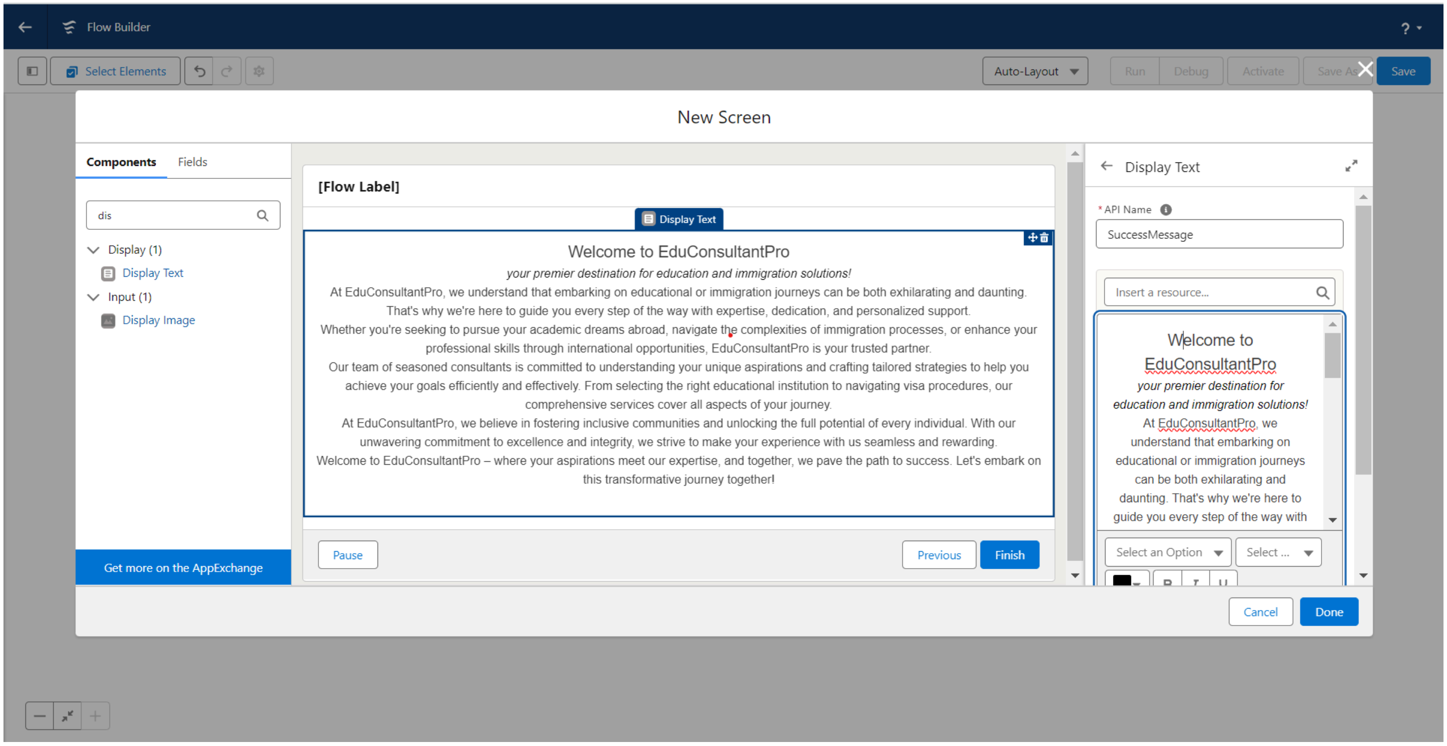
Whether you're seeking to pursue your academic dreams abroad, navigate the complexities of immigration processes, or enhance your professional skills through international opportunities, EduConsultantPro is your trusted partner.

Our team of seasoned consultants is committed to understanding your unique aspirations and crafting tailored strategies to help you achieve your goals efficiently and effectively. From selecting the right educational institution to navigating visa procedures, our comprehensive services cover all aspects of your journey.

At EduConsultantPro, we believe in fostering inclusive communities and unlocking the full potential of every individual. With our unwavering commitment to excellence and integrity, we strive to make your experience with us seamless and rewarding.

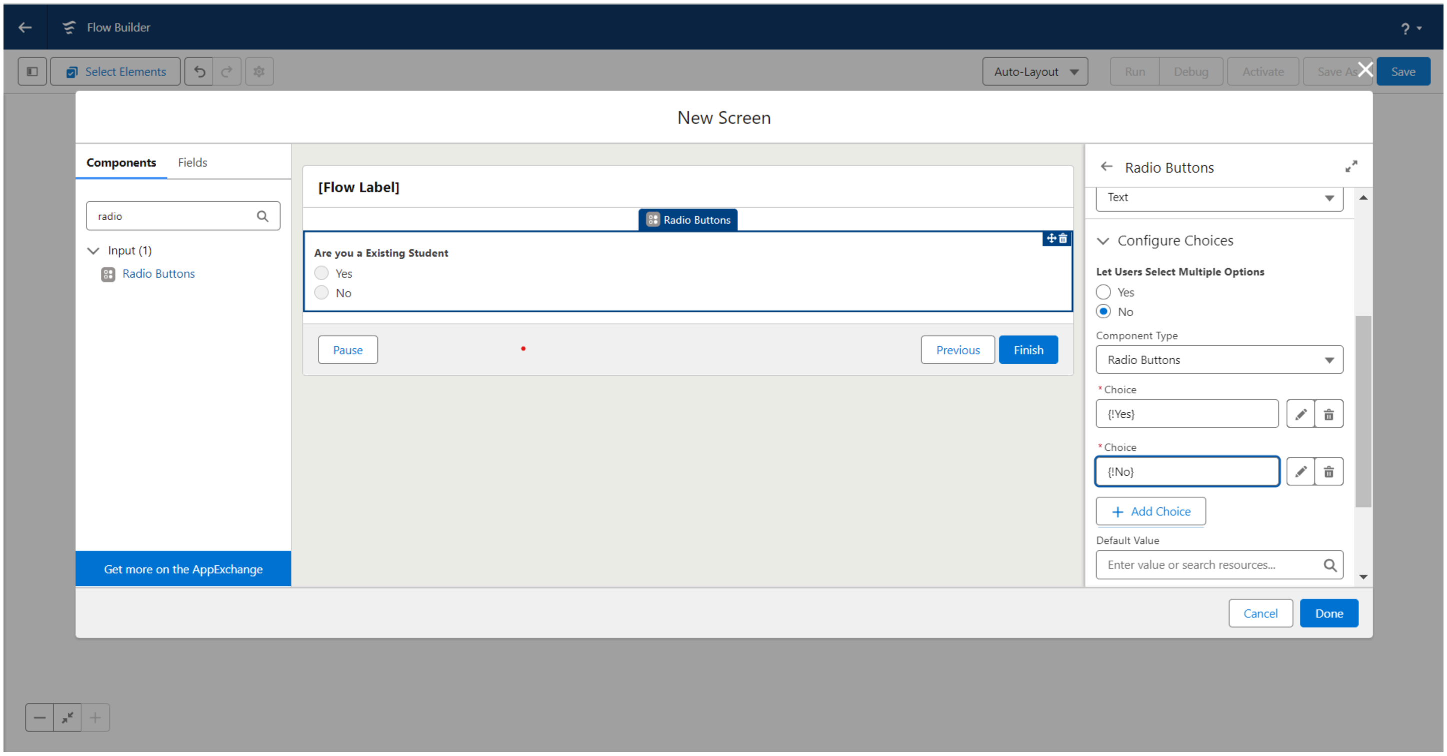
Welcome to EduConsultantPro – where your aspirations meet our expertise, and together, we pave the path to success. Let's embark on this transformative journey together!”

- Click Done to save the configuration.



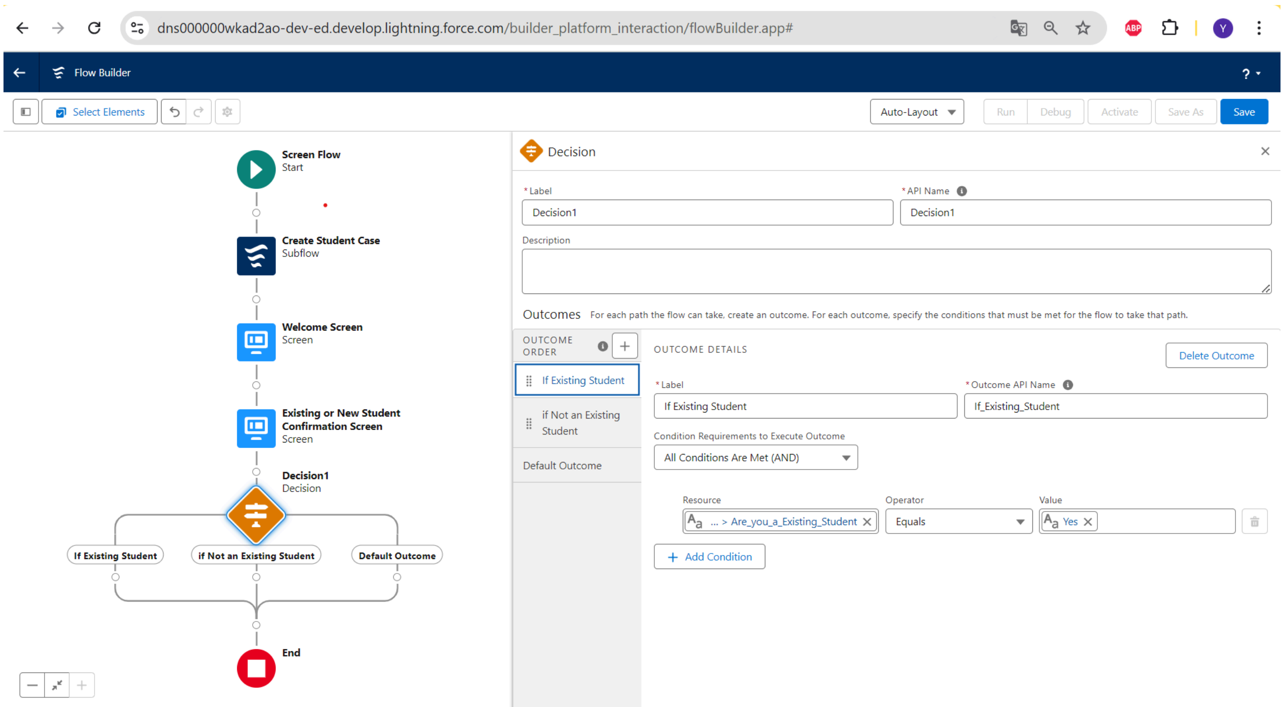
8.2 Add Screen Element

- Add a Screen Element after the Welcome Screen Element.
- Label the Screen Element as “Existing or New Student Confirmation Screen.”
- From the left side panel, add a radio button component.
- Label the radio button component: "Are you an Existing Student?"
- Click on Add Choice.
- Type “Yes” in the input field.
- Click Create to create the Yes choice.
- Click on Add Choice again.
- Type “No” in the input field.
- Click Create to create the No choice.
- Click Done to save the configuration.

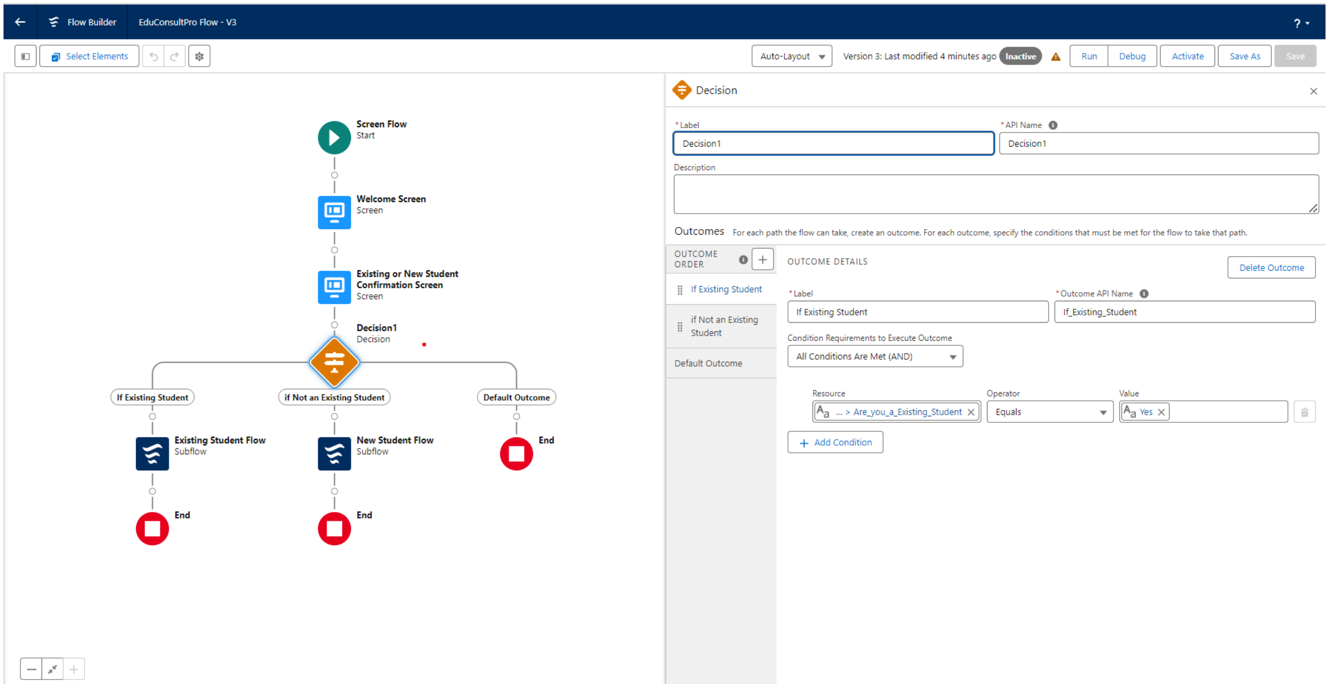


8.3 Add Decision Element

- Add a Decision Element after the “Existing or New Student Confirmation Screen” Element.
- Label the Decision Element as “Decision 1.”
- Under the outcome, label it as “If Existing Student.”
- Set the condition as follows:
- Resource: {!Are_you_a_Existing_Student}
- Operator: Equals
- Value: {!Yes}
- Click on the “+” icon.

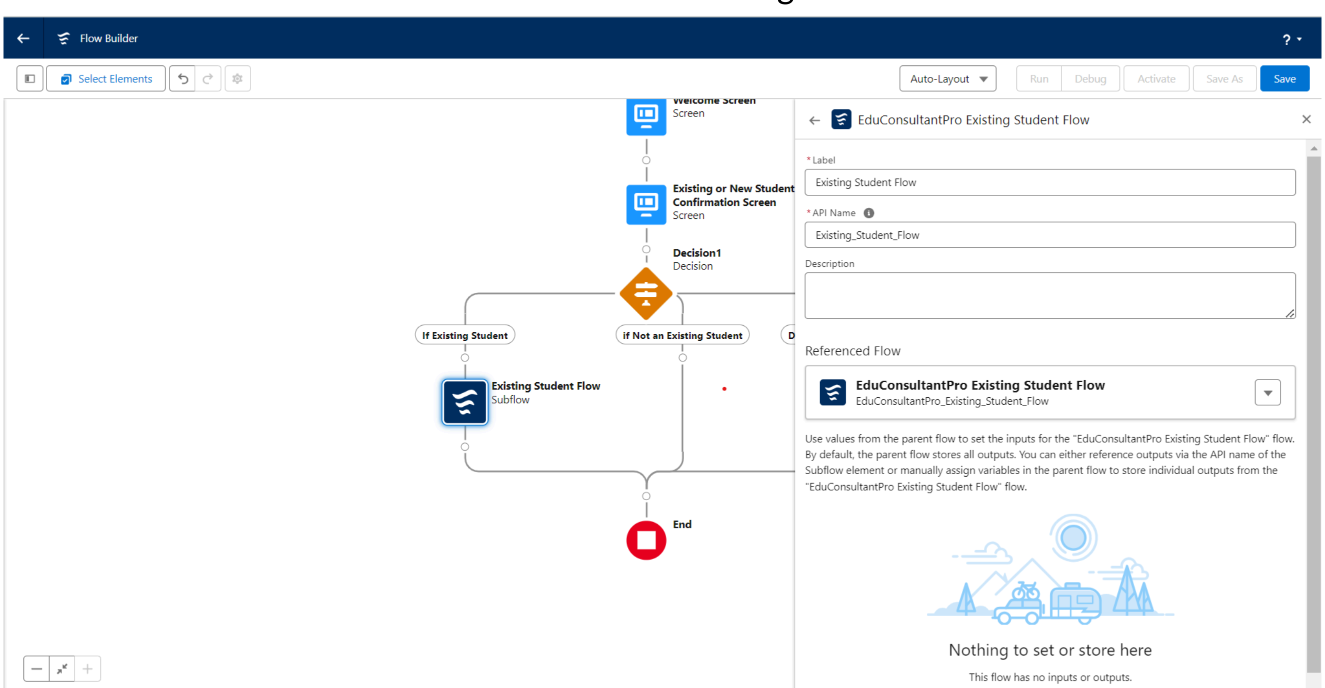


- Repeat the above steps to create a decision outcome for “If Not An Existing Student” with the following settings:
  - Resource: {!Are_you_a_Existing_Student}
  - Operator: Equals
  - Value: {!No}
- Click Done to save



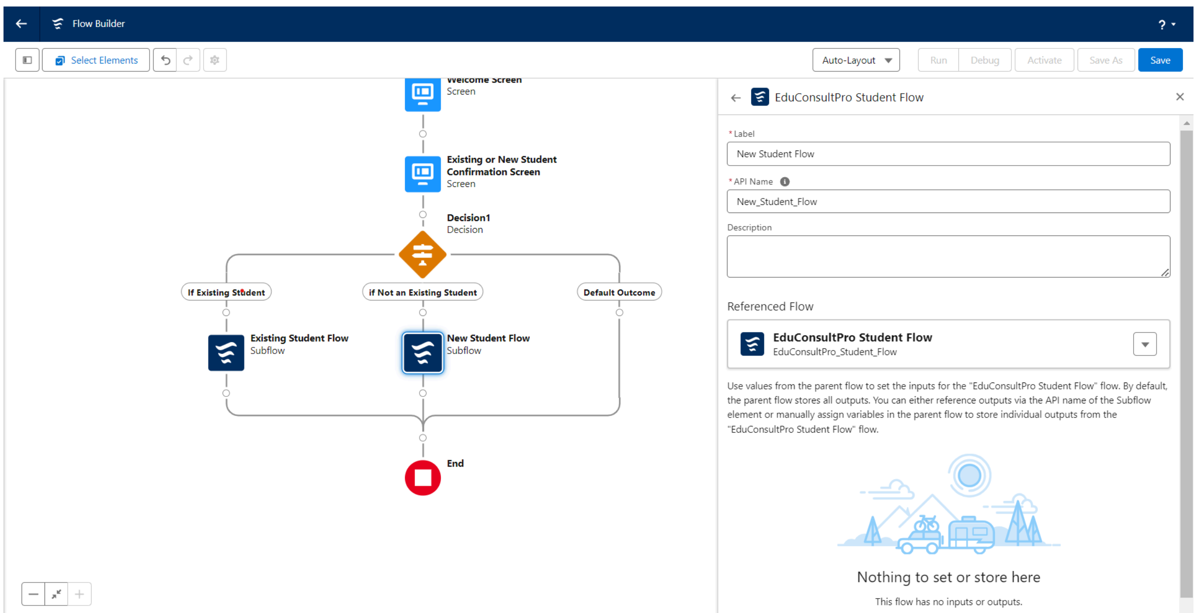
8.4 Add an SubFlow Element

- Add a Subflow Element after the Decision 1 Element on the "If Existing Student" path.
- Search for and select "EduConsultantPro Existing Student Flow."
- Label the Subflow Element as "Existing Student Flow."
- Click Done to save the configuration.
- Save the flow and label it as "EduConsultPro Existing Student Flow."



8.5 Add an SubFlow Element

- Add a Subflow Element after the Decision 1 Element on the “If Not an Existing Student” path.
- Search for and select “EduConsultantPro Student Flow.”
- Label the Subflow Element as “New Student Flow.”
- Click Done to save the configuration.
- Save the flow and label it as “EduConsultPro Existing Student Flow.”



9.Create a lightning app page

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

Navigate to Lightning App Builder:

- From the Salesforce Setup menu, enter “App Builder” in the Quick Find box.
- Click on “Lightning App Builder” to open the App Builder interface.

Create a New Page:

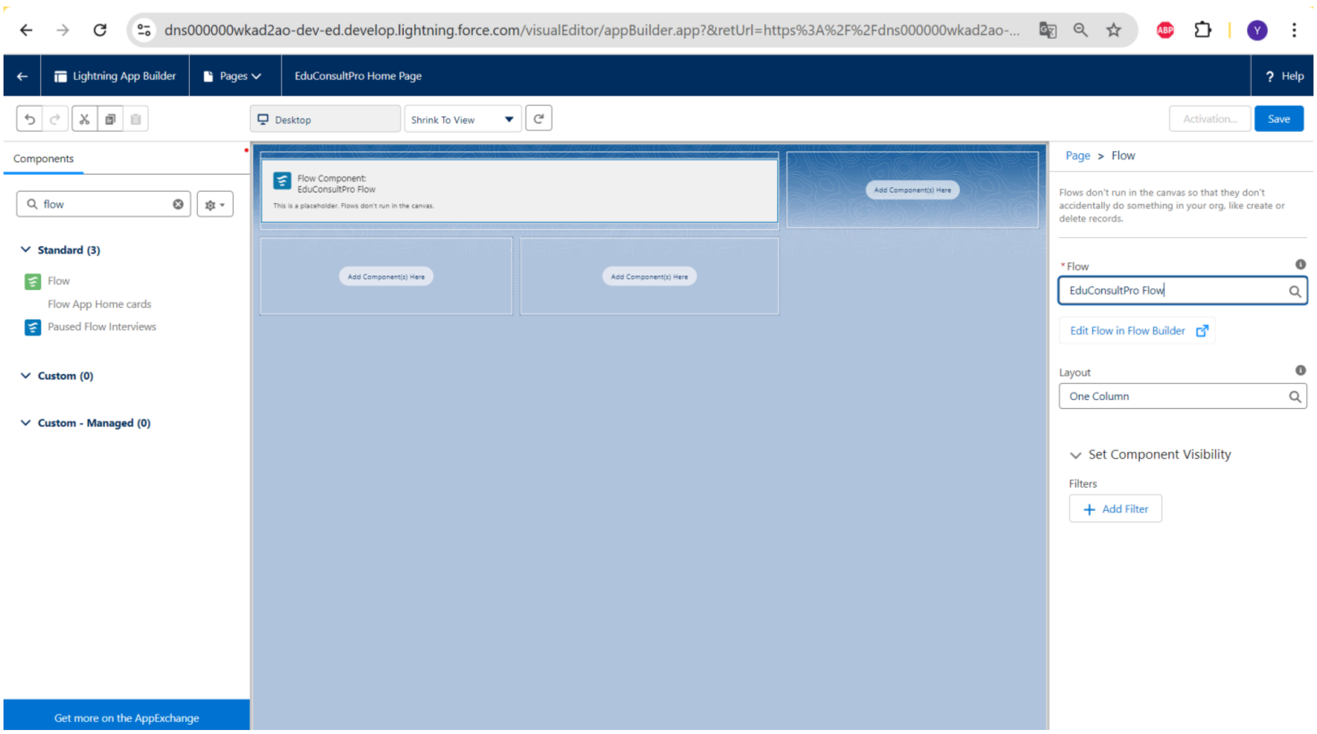
- Click the “New” button to start creating a new Lightning page.
- Select “Home Page” as the type of page you want to create and then click “Next.”

Configure the Page:

- Page Name: Enter “EduConsultPro Home Page” as the name of your page.
- Template: Choose the “Standard Home Page” template from the available options. This template provides a pre-defined layout suitable for home pages.
- Click “Done” to proceed with the template selection and page creation.

Add Components to the Page:

- Drag the “Flow” component from the left-hand panel to the top-right region of the page layout.
- This area will now hold the flow component where you will later assign the specific flow you want to use.



Configure the Flow Component:

- Click on the Flow component you've placed on the page.
- In the properties pane, search for the flow you want to add (e.g., "EduConsultantPro Flow").
- Select the flow and click "Save" to save your configuration.

Activate the Page:

- Click on the "Activate" button to make the page available to users.
- After clicking "Activate," a new screen will appear to configure app and profile assignments.

Assign Page to Apps and Profiles:

- Apps: Click on "App and Profile," then choose "Assign to Apps and Profiles."
- Select App: From the list of apps, select the "Sales" app where you want the page to be available. Click "Next."
- Select Profiles: Scroll through the list of profiles and select "System Administrator" to ensure this profile has access to the new page. Click "Next."
- Review Assignment: Review the assignment details to confirm that everything is set up correctly.
- Click "Save" to complete the assignment and make the page active for the selected app and profiles.
- By following these steps, you will create a customized Lightning App Page in

Salesforce and ensure it is accessible to the appropriate users.