A CRM Application to Manage the Services Offered by an Institution

The purpose of a CRM application created for an organization such as EduConsultPro Institute is to streamline the administration of crucial services such student questions, consulting requests, and admissions. With an increasing number of potential students, the handbook.

The management of these procedures becomes more error-prone and inefficient. This A CRM system acts as a single point of contact for gathering, keeping, and overseeing all student relevant data, allowing the organization to automate the application process, keep track of queries, and effectively oversee consulting services. By mechanizing essential tasks like application processing, correspondence follow-ups, and appointment scheduling, the CRM improves the excellent experience for both students and staff. Additionally, it encourages the careful handling of immigration situations, making certain that every contact is handled accurately and thoughtfully.

How to Create a Course Object in Salesforce

Step 1: Log In to Salesforce

1. Login: Access your Salesforce account by logging in.
2. Go to Setup: Click the gear icon in the top-right corner to enter the Setup menu.

Step 2: Open Object Manager

1. Navigate to Object Manager: In Setup, find the Object Manager tab at the top and click on it.
2. Create New Object: Click the "Create" button and choose "Create Object from Spreadsheet."

Step 3: Download the Course Spreadsheet

1. Download Spreadsheet: Click the provided link to download the Course object spreadsheet.
2. Save File: Save the downloaded file in an accessible location on your computer.

Step 4: Upload the Spreadsheet

1. Upload File: In the "Create Object from Spreadsheet" window, click "Upload Your File."
2. Select File: Locate the Course spreadsheet you saved and upload it.

Step 5: Map Fields

1. Auto Mapping: Salesforce will automatically map spreadsheet fields to object fields.
2. Review Mappings: Double-check the field mappings to ensure they align with your spreadsheet.
3. Adjust as Necessary: Modify incorrect mappings by selecting the appropriate field from the dropdown.

Step 6: Create the Course Object

1. Proceed: Once mappings are confirmed, click "Next."

2. Final Review: Review all object details and mappings for accuracy.
3. Finish: Click "Create" to complete the process.

Step 7: Verify the Course Object

1. Return to Object Manager: After creation, go back to Object Manager.
2. Locate Course Object: Search for the Course object, and review its fields and relationships.

Step 8: Test the Course Object

1. Access Courses: From the App Launcher (grid icon in the top-left), search for "Courses."
2. Create a Test Record: Add a new Course record to verify that the object functions correctly.

How to Create the Remaining Objects in Salesforce

Step 1: Log In to Salesforce

1. Login: Start by logging into your Salesforce account.
2. Go to Setup: Click the gear icon in the top-right corner to access the Setup menu.

Step 2: Open Object Manager

1. Navigate to Object Manager: In Setup, find the Object Manager tab and click it.
2. Create New Object: Select "Create" and choose "Create Object from Spreadsheet."

Step 3: Download Required Spreadsheets

1. Download Spreadsheets: Use the provided links to download the spreadsheets for:
   - Consultant
   - Student
   - Appointment
2. Save Files: Save each spreadsheet to a convenient location on your computer.

Step 4: Upload the Spreadsheet

1. Upload File: In the "Create Object from Spreadsheet" window, click "Upload Your File."
2. Select Spreadsheet: Locate and upload the appropriate spreadsheet you saved earlier.

Step 5: Map Fields

1. Auto Mapping: Salesforce will automatically map fields from the spreadsheet to the object fields.
2. Review Mappings: Check that the fields are mapped correctly to match the spreadsheet.
3. Make Adjustments: If needed, use the dropdown menus to correct any mismatches.

Step 6: Create the Object

1. Proceed to Next: After confirming the mappings, click "Next."

2. Final Review: Review object details and mappings for accuracy.
3. Finish Creation: Click "Create" to complete the process.

Step 7: Verify the New Object

1. Return to Object Manager: After creation, go back to Object Manager.
2. Locate Object: Search for the Consultant, Student, or Appointment object and review its fields and settings.

Step 8: Test the Object

1. Access the Object: Open the App Launcher (grid icon in the top-left) and search for the newly created object.
2. Create Test Record: Add a new record to ensure that the object functions as expected.

Creating Relationships Among Objects in Salesforce

Task 1: Creating Lookup Relationships

1. Create Lookup Relationship Between Appointment and Student
   1. Access Salesforce:
      - Log in to your Salesforce account.
      - Navigate to Setup by clicking the gear icon in the top-right corner.
   2. Navigate to Object Manager:
      - Click on the Object Manager tab.
      - Find and select the "Appointment" object.
   3. Add Lookup Relationship:
      - In the Appointment object, go to the "Fields & Relationships" section.
      - Click "New" to add a new field.
      - Select "Lookup Relationship" as the data type and click "Next."
      - Choose "Student" from the Related To dropdown menu.
      - Click "Next," configure the relationship settings, and click "Save."

2. Create Lookup Relationship Between Appointment and Consultant
   1. Navigate to Object Manager:
      - If not already in the Appointment object, search for and select it.
   2. Add Lookup Relationship:
      - In the "Fields & Relationships" section, click "New" to create a new field.
      - Choose "Lookup Relationship" as the data type and click "Next."
      - Select "Consultant" from the Related To dropdown menu.
      - Click "Next," configure the relationship settings, and click "Save."

3. Create Lookup Relationship Between Student and Case

1. Navigate to Object Manager:
   - Search for and select the "Student" object.
2. Add Lookup Relationship:
   - In the "Fields & Relationships" section, click "New" to add a new field.
   - Choose "Lookup Relationship" as the data type and click "Next."
   - Select "Case" from the Related To dropdown menu.
- Click "Next," configure the relationship settings, and click "Save."

Task 2: Creating the Registration Object

1. Create the Registration Object

1. Navigate to Object Manager:
   - Go to Setup and click on the Object Manager tab.
   - Click "Create" and select "Custom Object."
2. Define Object Details:
   - Enter "Registration" in the Label field.
   - The Plural Label will automatically fill in as "Registrations."
   - Provide an Object Name (API name), such as "Registration."
   - Choose either Auto Number or Text for the Record Name, depending on your preference.
   - Click "Save."

2. Add Fields to the Registration Object

1. Add Lookup Relationship to Student:
   - In the Registration object, go to the "Fields & Relationships" section.
   - Click "New," select "Lookup Relationship," and click "Next."
   - Choose "Student" from the Related To dropdown menu.
   - Click "Next," configure the relationship settings, and click "Save."
2. Add Lookup Relationship to Course:
- Follow the same steps as above, but select "Course" from the Related To dropdown.
   - Click "Next," configure the settings, and click "Save."
3. Add Additional Fields:
   - Click "New" to create any other necessary fields, such as Registration Date or Status.
- Select the appropriate data types, configure the settings, and click "Save" after each field.

Configuring the Case Object in Salesforce

1. Log In to Salesforce

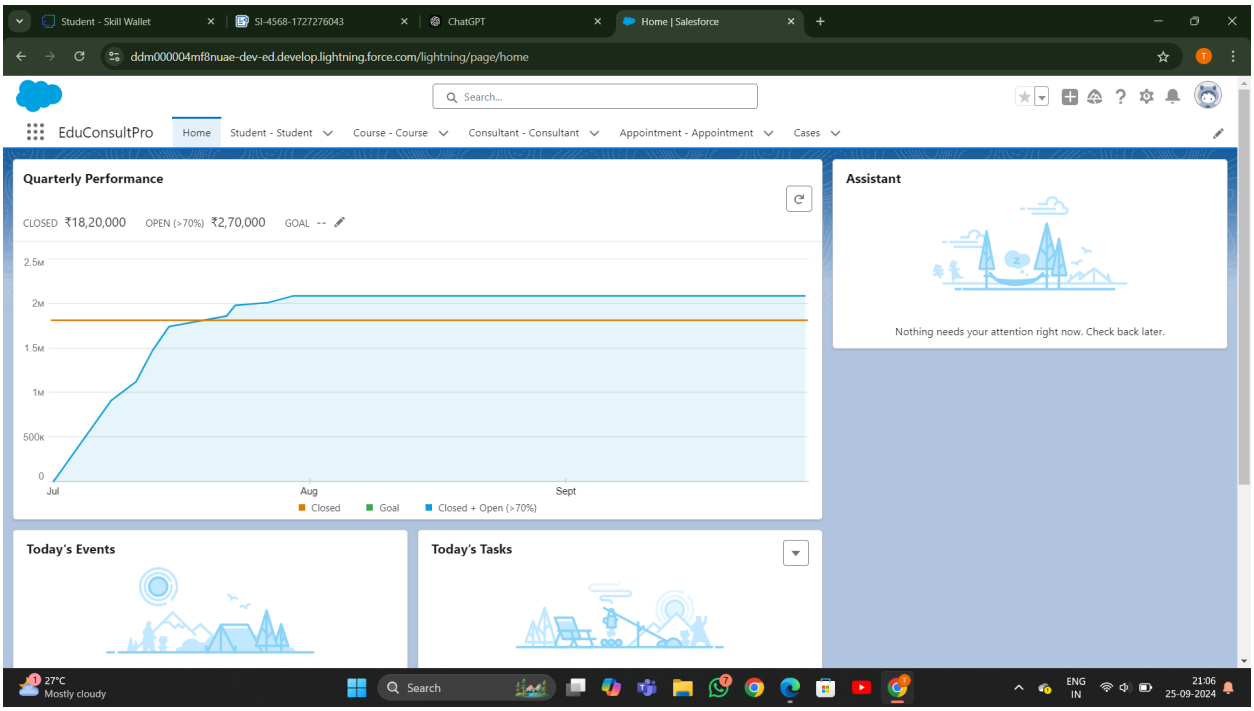
- Log in to your Salesforce account with credentials that allow you to modify object settings.

2. Access Object Manager
   - From the home page, click the "App Launcher" (grid icon) in the top-left corner.
   - Search for "Object Manager" in the search bar and select it from the results.
3. Locate the Case Object
   - In Object Manager, search for "Case" or scroll through the list of objects to find it.
   - Click on "Case" to access its settings.
4. Edit the Case Object Fields
   - Click on the "Fields & Relationships" tab within the Case object settings.
5. Configure the "Type" Field
   - Scroll through or search to find the "Type" field.
   - Click on "Type" to open its settings.
   - Click "New" to add new picklist values.
   - Enter "Immigration" and "Visa Application" as new options, and click "Save" after adding each one.
6. Configure the "Status" Field
   - Return to the "Fields & Relationships" tab and locate the "Status" field.
   - Click on "Status" and then "New" to add additional picklist values.
   - Add "Open" and "In-progress" as new values, clicking "Save" after each.
7. Verify the Changes
   - After saving, review the "Type" and "Status" picklist options to ensure the new values have been added.
8. Update Page Layouts (if needed)
   - If the new values need to be visible on specific page layouts, go to the "Page Layouts" section in the Case object settings.
   - Adjust the layouts as needed to display the "Type" and "Status" fields.
9. Test the Configuration
 - Create a new case or edit an existing one to ensure the new picklist values for "Type" and "Status" appear and function as expected.

How to Create a Lightning App in Salesforce

1. Log In to Salesforce
   - Log in to your Salesforce account using an admin-level account.
2. Open App Manager
   - Click the "Gear" icon in the top-right corner to open the Setup menu.
   - In the Quick Find box on the left, type "App Manager" and select it from the search results.

3. Create a New Lightning App
- In the App Manager, click the "New Lightning App" button to start the creation process.
4. Enter Basic App Information
- In the App Name field, type "EduConsultPro."
- The Plural Name will auto-populate based on the app name.
- Optionally, add a description for the app.
- Click "Next" to proceed.
5. Configure App Branding
- If desired, customize the app by uploading a logo and choosing a color scheme.
- If no branding is needed, skip this step and click "Next."
6. Set Up App Navigation
- In the "Available Items" section, find and select the following tabs: Home, Students, Courses, Consultants, Appointments, Registrations, and Cases.
- Move these items to the "Selected Items" list by clicking the right arrow.
- Click "Next" to continue.
7. Configure App Visibility
- In the Profile Access section, select the "System Administrator" profile and move it to the "Selected Profiles" list.
- Click "Save & Finish" to complete the process.
8. Verify and Access Your New App
- After saving, you will find "EduConsultPro" listed in the App Manager.
- Open the App Launcher (grid icon), find "EduConsultPro," and select it to access and test the new app.



How to Create a Screen Flow for Student Admission Application in Salesforce

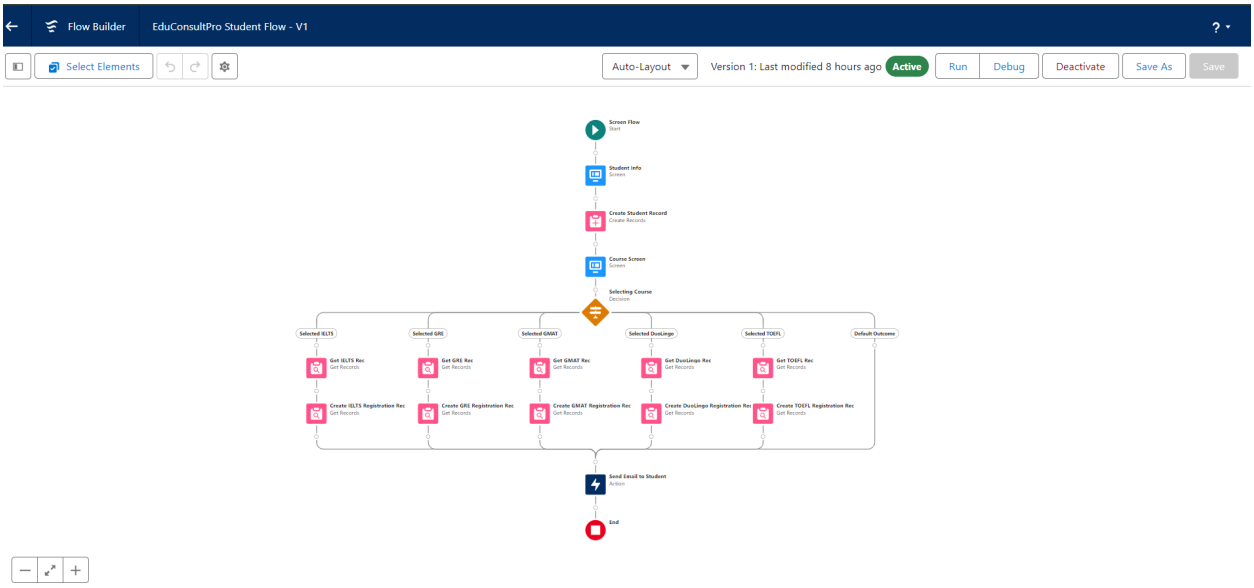
1. Log In to Salesforce
   - Log in to your Salesforce account with the necessary permissions to create and manage Flows.
2. Open Flow Builder
   - Click the "Gear" icon in the top-right corner to access the Setup menu.
   - In the Quick Find box, type "Flow Builder" and select it from the results.
3. Start a New Flow
   - In Flow Builder, click "New Flow."
   - Choose the "Screen Flow" type and click "Create."
4. Add a Screen Element
   - In the Flow Builder canvas, find the "Screen" element in the "Elements" tab on the left and drag it to the canvas.
5. Configure the Screen Element
   - Set the Label to "Student Info" in the properties pane on the right.
   - The API Name will auto-fill based on the label, but you can customize it if necessary.
6. Create a New Resource for the Student Object
   - Click "New Resource."
   - Select "Variable" as the Resource Type.
   - Enter "StudentRecordRes" as the API Name.
   - Choose "Record" as the Data Type and select the "Student" object.
   - Check "Available for input" if you want the variable to be passed into the flow.

- Click "Done" to save the new resource.

7. Add Fields to the Screen
   - With "StudentRecordRes" selected, the fields from the Student object will appear in the "Fields" pane.
   - Drag and drop fields such as Name, Email, and Phone Number onto the screen element in the canvas.

8. Save and Activate the Flow
   - Click "Save" and provide a name and description for the flow if prompted.
   - To make the flow operational, click "Activate."

9.Test the Flow
 - Run the flow to ensure the "Student Info" screen displays correctly and allows for student information entry.



Create Users in Salesforce :

How to Create a User with Standard Platform User Profile in Salesforce

1. Log In to Salesforce
   - Log in using your administrative account with the necessary privileges.

2. Navigate to User Creation
   - Click the "Gear" icon in the top-right corner to access the Setup menu.
   - In the Quick Find box, type "Users" and select it from the dropdown.

3. Create a New User
   - Click the "New User" button.

4.Fill in User Details
   - Last Name: Enter "Consultant."

- License: From the dropdown, select "Salesforce Platform."
- Profile: Choose "Standard Platform User" from the Profile dropdown.
- Mandatory Fields: Complete all required fields such as First Name, Username, Email, Alias, Role, User License, and Profile.
- Ensure the Username is unique and typically follows an email format.

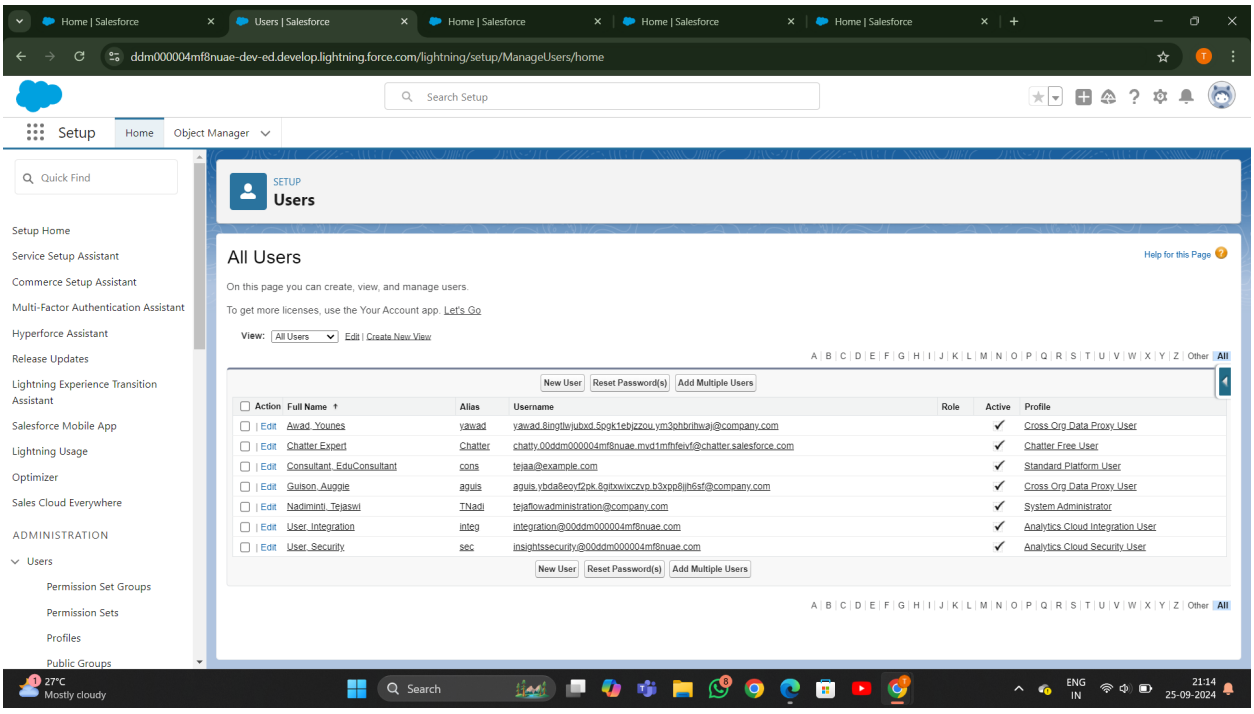
5. Save the User
- Click "Save" to create the new user.

Configure User Settings

1.Navigate to User Settings
- Go back to the "Users" section in the Setup menu to view the list of users.
- Find the newly created user (Consultant) and click "Edit" next to their name.

2. Update Approver Settings
- Scroll down to the "Approver Settings" section.
- In the "Manager" field, select "Consultant" from the dropdown list (ensure that the "Consultant" user exists and is assigned to the correct role).

3. Save Changes
- Click "Save" to apply the updates to the user's settings.



Steps to Create an Approval Process for the Property Object

1.Enable Lightning Email Templates

-Navigate to Email Template Settings:
- Access Setup.
- In the Quick Find box, type "Templates" and select "Lightning Email Templates."

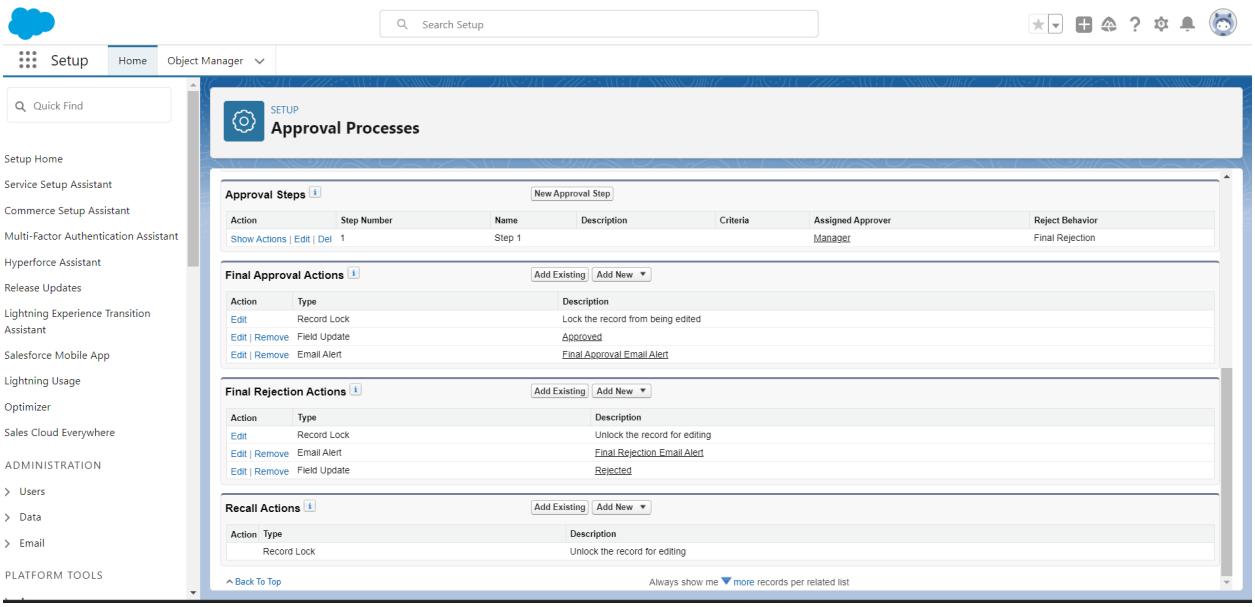
- Ensure the feature is activated.

2. Create a Folder for Email Templates
   - Open App Launcher:
     - Click the App Launcher (grid icon) in the top-left corner.
     - Search for and select "Email Templates."
   - Create a New Folder:
     - Click "New Folder."
     - Enter a name for the folder, such as "Property Email Templates."
     - Click "Save."
3. Create the Submission Template
   - Open Email Templates:
     - In the Email Templates app, click "New Email Template."
   - Configure the Email Template:
     -Folder: Select the folder you created (e.g., "Property Email Templates").
     - Email Template Name: Enter "Submission Template."
     - Subject: Enter a relevant subject, like "Property Submission Confirmation."
     - HTML Value: Customize the content as necessary.
   - Save the Template.
4. Create Approval and Rejection Templates
   - Create the Approval Template:
     - Click "New Email Template" again.
     - Email Template Name: Enter "Approval Template."
     -HTML Value: Customize the message to confirm the approval of the property request.
     - Save the template.
   - Create the Rejection Template:
     - Click "New Email Template" once more.
     -Email Template Name: Enter "Rejection Template."
     -
HTML Value: Customize the message to inform the user of the rejection.
     - Save the template.
5. Create an Approval Process
   - Navigate to Approval Processes:
     - In the Quick Find box, type "Approval Processes" and select it.
   - Create a New Approval Process:
     - For "Manage Approval Processes For," select "Property."
     - Click "Create New Approval Process."

- Choose "Use Jump Start Wizard" and click "Next."
- Configure the Approval Process:
- Process Name: Enter "Property Approval."
- Select Approver: Choose "Manager" for the option “Automatically assign an approver using a standard or custom hierarchy field.”
- Set Approver Settings:
-Automated Approver Determined By: Select "Manager."
- Record Editability Properties:
- Choose "Administrators OR the currently assigned approver can edit records during the approval process."
- Save the Approval Process:
- Click "Save" to create the process.

6. Configure Initial Submission Actions
- View Approval Process Detail Page:
- Click on "View Approval Process Detail Page."
- Initial Submission Actions:
- Add New: Click "Field Update" and configure the field update values based on your requirements.
- Add New: Click "Email Alert."
- Description: Enter "Submission Email Alert."
- Email Template: Choose "Submission Template."
-Recipient Type: Select the desired recipient type (e.g., "Select your Name").

7.Configure Final Approval and Rejection Actions
- Final Approval Actions:
- Add New: Click "Email Alert."
- Description: Enter "Approval Email Alert."
- Email Template: Choose "Approval Template."
-Recipient Type: Select the appropriate recipient type.
-Final Rejection Actions:
-Add New: Click "Email Alert."
-Description: Enter "Rejection Email Alert."
- Email Template: Choose "Rejection Template."
- Recipient Type: Select the appropriate recipient type.



Create a Record-Triggered Flow

1. Configure the Start Element

1.Log In to Salesforce

- Sign in with administrative privileges.

2.Navigate to Flow Setup

- Click the Gear icon in the top-right corner to access the Setup menu.
- In the Quick Find box, type Flows and select Flows from the dropdown.

3. Create a New Flow

- Click New Flow.
- Select Record-Triggered Flow from the available options.
- Click Create to open the Configure Start window.

4.Configure the Start Element

- Object: From the dropdown, select Appointment to set the flow to trigger on changes to Appointment records.
- Trigger the Flow When: Choose A record is created to ensure the flow activates when a new Appointment record is added.

5. Completion

- The flow is now set to start whenever a new Appointment record is created.

2. Add an Action Element

1.Add the Action Element

- Drag the Action element from the left panel onto the flow canvas, placing it after the Start element.

2. Configure the Action Element

- Label: Enter "Approval SubFlow."

- Action Type: Select Submit for Approval from the options.

3. Set the Record ID

- Record ID: Enter `{!$Record.Id}` to bind the action to the ID of the record that triggered the flow, ensuring the correct record is submitted for approval.

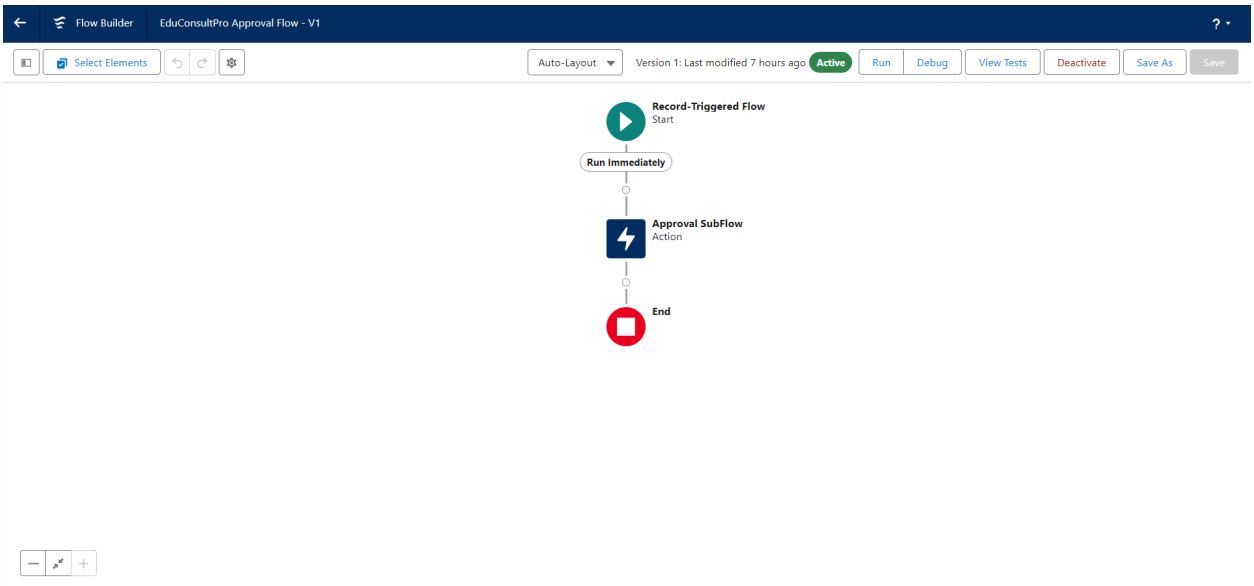
3. Save and Activate the Flow

1. Save the Flow

- Click Save in the top-right corner of the Flow Builder.
- Flow Name: Enter "EduConsultPro Approval Flow."
- Optionally, add a description for clarity.
- Click Save to finalize your changes.

2. Activate the Flow

- Click Activate to make the flow live, ensuring it will trigger upon the creation of a new Appointment record.



Create a Screen Flow for Existing Student to Book an Appointment

1. Create a New Screen Flow

1. Log In to Salesforce

- Sign in with administrative privileges.

2. Navigate to Flow Builder

- Go to Setup.
- In the Quick Find box, type Flow Builder and select it.
- Click New Flow.
- Choose Screen Flow and click Create.

2. Add a Screen Element to Get Student Info

1. Add Screen Element

- Drag a Screen element from the left panel onto the flow canvas.

2. Configure Screen Properties
   - Label: Enter "Get Student Info."
3. Add Text Components
   - Drag and drop Text components to the screen element:
     - First Text Component: Label as "Enter Student Name."
     - Second Text Component: Label as "Enter Student Email."
4. Save the Screen Element
   - Click Done to save the screen element.

3. Add Get Records Element to Retrieve Student Record

1.Add Get Records Element
   - Drag a Get Records element onto the canvas, placing it after the Get Student Info screen.

2. Configure Get Records
   - Object : Select Student .
   - Condition Requirements : Select All Conditions are Met (AND) .
   - Field Conditions :
     - Field : Student Name
     - Operator : Equals
     - Value : `{!Enter_Student_Name}`
     - Field : Email__c
     - Operator : Equals
     - Value : `{!Enter_Student_Email}`
3. Save the Get Records Element
   - Click Done .

4. Add Decision Element for Appointment or Case

1. Add Decision Element
   - Drag a Decision element onto the canvas, placing it after the Get Records element.
2. Configure Decision Outcomes
   - Outcome Label : Enter "Appointment."
   - Condition :
     - Resource : `{!How_may_I_Help_you}`
     - Operator : Equals
     - Value : `{!Book_an_Appointment}`
   - Click the "+" icon to add additional outcomes for Case .
3. Save the Decision Element

- Click Done .

5. Add Screen Element for Appointment Booking

1. Add Screen Element
   - Drag a Screen element onto the canvas, placing it on the Appointment path.
2. Add Fields
   - Label : Enter "Appointment Booking Screen."
   - Fields :
     - Click on Fields and create a new resource named "AppointmentRecordRes" to display fields from the Appointment object.
     - Drag necessary fields from Appointment object to the screen to collect information.

3. Save the Screen Element
   - Click Done .

6. Add Get Records Element to Retrieve Consultant Record

1. Add Get Records Element
   - Drag a Get Records element onto the canvas, placing it after the Appointment Booking Screen .
2. Configure Get Records
   - Object : Select Consultant .
   - Condition Requirements : Select All Conditions are Met (AND) .
   - Field Conditions :
     - Field : Name
     - Operator : Equals
     - Value : `{!AppointmentRecordRes.Consultant_Name__c}`
3. Save the Get Records Element
   - Click Done .

7. Add Create Records Element for Appointment

1. Add Create Records Element
   - Drag a Create Records element onto the canvas, placing it after the Get Consultant Record element.
2. Configure Create Records
   - How Many Records to Create : Select One .

- How to Set the Record Fields: Select Use separate resources, and literal values.
   - Object : Select Appointment .
   - Field Updates :
     - Appointment_DateTime__c : `{!AppointmentRecordRes.Appointment_DateTime__c}`
     - Consultant__c : `{!Get_Consultant_Rec.Id}`

- Notes__c : `{!AppointmentRecordRes.Notes__c}`
- PurposeTopic__c : `{!AppointmentRecordRes.PurposeTopic__c}`
- Student_Name__c : `{!Get_Rec.Id}`

3. Save the Create Records Element
- Click Done .

8. Add Confirmation Screen

1. Add Screen Element
- Drag a Screen element onto the canvas, placing it after the Create Appointment element.

2. Add Display Text Component
- Label : Enter "Appointment_Confirmation."
- Configure Display Text : Paste the confirmation message into the resource picker box.

3. Save the Screen Element
- Click Done .

9. Add Subflow Element

1. Add Subflow Element
- Drag a Subflow element onto the canvas, placing it after the Decision Element on the Case path.

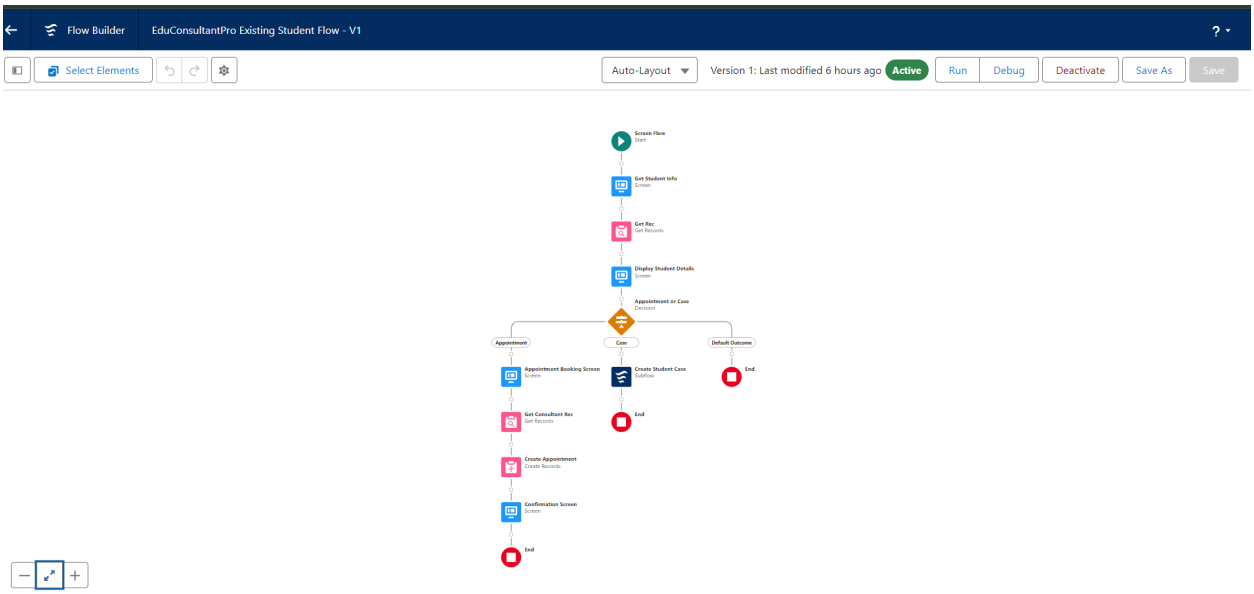
2. Configure Subflow
- Label : Enter "Create Student Case."
- Subflow : Search for and select "Create a Case."

3. Save the Subflow Element
- Click Done .

10. Save and Activate the Flow

1. Save the Flow
- Click Save .
- Flow Label : Enter "EduConsultPro Existing Student Flow."
- Click Save .

2. Activate the Flow
- Click Activate to make the flow live and operational.



Create a Screen Flow to Combine All Flows in One Place

1. Create a Lightning App Page

1. Open Salesforce and Navigate to the App Builder
   - Access the Setup menu (gear icon).
   - In the Quick Find box, type App Builder and select Lightning App Builder .
2. Create a New App Page
   - Click New .
   - Select App Page and click Next .
   - Enter the Page Name (e.g., "EduConsultPro Flow").
   - Choose a Page Template (e.g., One Region or Two Regions based on your preference).
   - Click Finish .

2. Add and Configure Screen Elements

a. Add the Welcome Screen

1. Drag a Screen Component
   - Drag a Screen component onto the main panel.
   - Label : Enter "Welcome Screen."
2. Add a Display Text Component
   - From the left-side panel, search for Display Text .
   - Drag and drop it into the Welcome Screen.
   - Label : Enter "SuccessMessage."

3. Enter Text Content
   - Paste the welcome message or relevant text into the Resource Picker box.

4. Save the Component
- Click Done to save the component.

b. Add the Existing or New Student Confirmation Screen

1. Drag a Screen Component
- Drag a Screen component onto the main panel after the Welcome Screen.
- Label : Enter "Existing or New Student Confirmation Screen."
2. Add a Radio Button Component
- From the left-side panel, search for Radio Buttons .
- Drag and drop it into the Existing or New Student Confirmation Screen.
- Label : Enter "Are you an Existing Student."
3. Configure Choices
- Click Add Choice .
  - Type : Enter "Yes" and click Create .
  - Repeat to add a choice labeled "No."
4. Save the Component
- Click Done to save the component.

3. Add and Configure Decision Element

1. Drag a Decision Element
- Drag a Decision element onto the main panel after the Existing or New Student Confirmation Screen.
- Label : Enter "Decision 1."
2. Configure the Decision Element
- Outcome 1 :
  - Label : Enter "If Existing Student."
  - Condition :
    - Resource : `{!Are_you_an_Existing_Student}`
    - Operator : Equals
    - Value : `{!Yes}`
- Click the "+" icon to add another outcome.
- Outcome 2 :
  - Label : Enter "If Not an Existing Student."
  - Condition :
    - Resource : `{!Are_you_an_Existing_Student}`
    - Operator : Equals
    - Value : `{!No}`
3. Save the Decision Element
- Click Done to save the decision element.

4. Add and Configure Subflow Elements

a. Existing Student Flow

1. Drag a SubFlow Element

- Drag a Subflow element onto the main panel after the Decision 1 element on the "If Existing Student" path.
- Search for : EduConsultantPro Existing Student Flow.
- Label : Enter "Existing Student Flow."

2. Save the Subflow Element

- Click Done to save the subflow element.

b. New Student Flow

1. Drag Another SubFlow Element

- Drag another Subflow element onto the main panel after the Decision 1 element on the "If Not an Existing Student" path.
- Search for : EduConsultPro Student Flow.
- Label : Enter "New Student Flow."

2. Save the Subflow Element

- Click Done to save the subflow element.

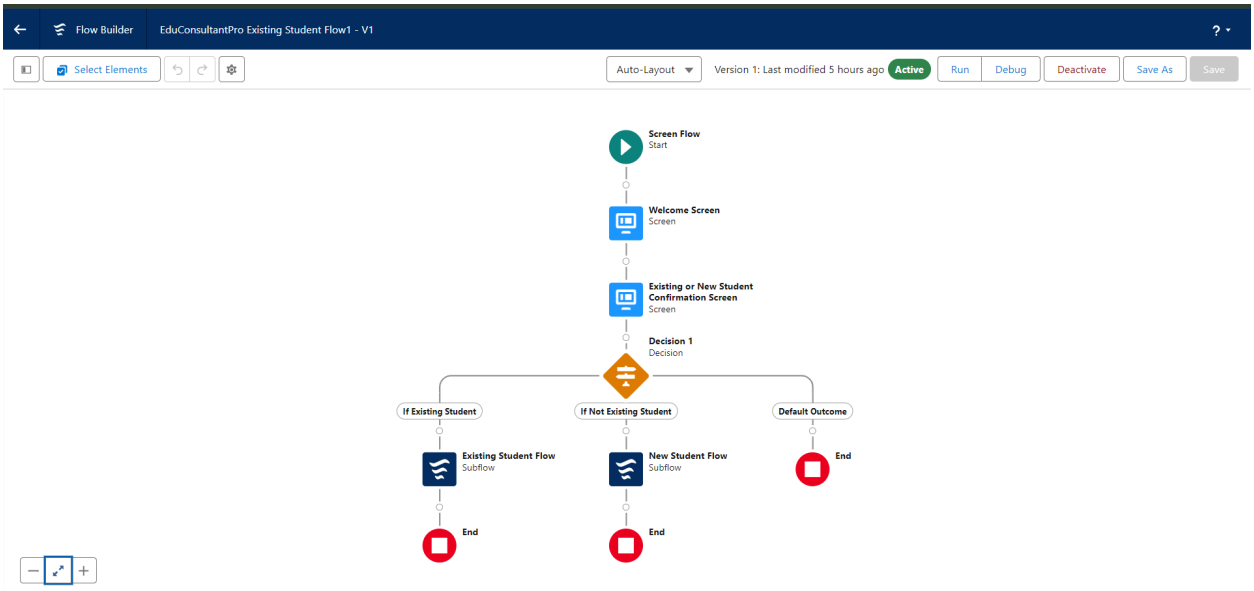
5. Save and Finalize the Flow

1. Save the Flow

- Click Save .
- Flow Label : Enter "EduConsultPro Flow."

2. Activate the Flow

- Click Activate to make the flow available for use.



Create a Lightning App Page

1. Create a New Home Page

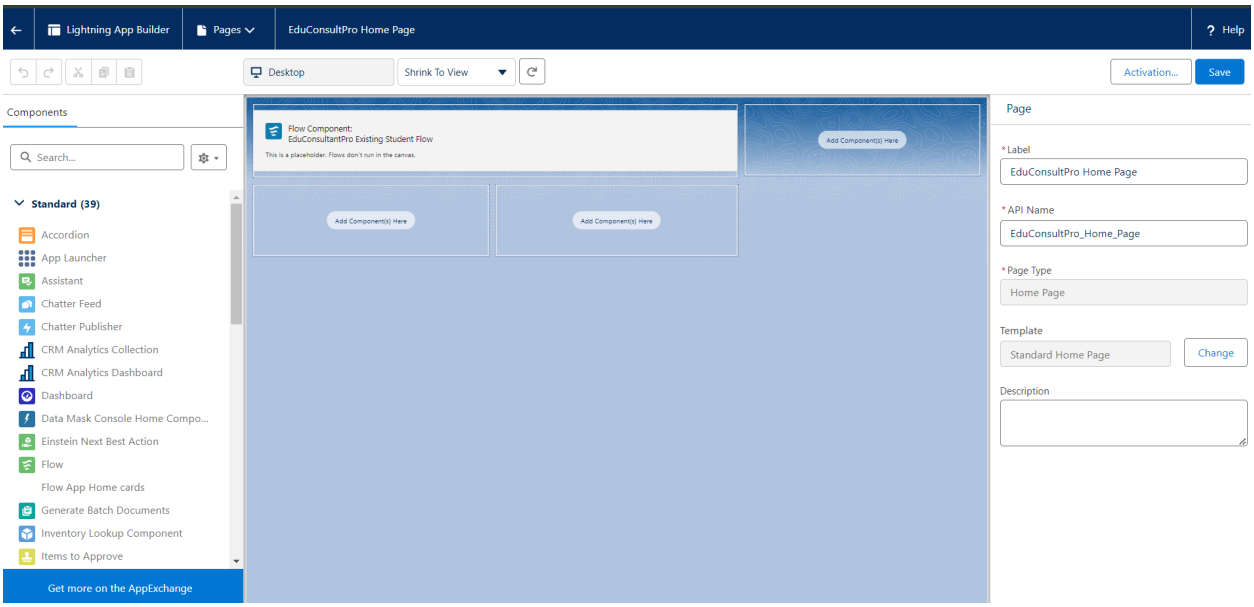
1. Open Salesforce and Navigate to App Builder
   - From the Setup menu, enter "App Builder" in the Quick Find box and select "Lightning App Builder."
2. Create a New Page
   - Click New .
   - Select Home Page and click Next .
   - Page Name : Enter "EduConsultPro Home Page."
   - Page Template : Choose the "Standard Home Page" template.
   - Click Finish .

2. Add the Flow Component

1. Add a Flow Component
   - In the Lightning App Builder interface, drag the "Flow" component from the left panel to your desired region of the page layout (e.g., the top-right region).
2. Configure the Flow Component
   - With the Flow component selected, use the right panel to search for and select the flow named "EduConsultantPro Flow."
3. Save the Page
   - Click Save to apply your changes.

3. Activate and Assign the Page

1. Activate the Page
   - Click Activate in the top-right corner of the Lightning App Builder.
2. Assign the Page to Apps and Profiles
   - Click App and Profile in the activation options.
   - Select Assign to Apps and Profiles.
3. Select the Sales App
   - In the app assignment screen, choose the "Sales" app.
   - Click Next.
4. Select Profiles
   - Scroll through the list of profiles and select "System Administrator."
   - Click Next.
5. Review the Assignment
   - Review the assignment details and click Save to finalize the page assignment.


Lightning App Builder
Pages
EduConsultPro Home Page
Help
Desktop
Shrink To View
Activation...
Save
Components
Search...
Standard (39)
Accordion
App Launcher
Assistant
Chatter Feed
Chatter Publisher
CRM Analytics Collection
CRM Analytics Dashboard
Dashboard
Data Mask Console Home Compo...
Einstein Next Best Action
Flow
Flow App Home cards
Generate Batch Documents
Inventory Lookup Component
Items to Approve
Get more on the AppExchange
Flow Component:
EduConsultantPro 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
*Label
EduConsultPro Home Page
*API Name
EduConsultPro_Home_Page
*Page Type
Home Page
Template
Standard Home Page
Change
Description