

A CRM APPLICATION TO MANAGE THE SERVICES OFFERED BY AN INSTITUTION

1.Create Objects from Spreadsheet:

Configure the Case Object:

The screenshot shows the Salesforce Object Manager interface for configuring the Case object. The page is titled "Object Manager" and "Step 2. Enter the details". It includes a search bar at the top and a navigation menu with "Setup", "Home", and "Object Manager". The main content area contains a form for configuring the Case object. The form includes a "Field Label" field with the value "Status", a "Field Name" field with the value "Status", a "Description" field, and a "Help Text" field. There are also checkboxes for "Display values alphabetically, not in the order entered", "Use first value as default value", and "Restrict picklist to the values defined in the value set". The "Status" field is highlighted in red. The "Field Label" and "Field Name" fields are also highlighted in red. The "Description" and "Help Text" fields are highlighted in red. The "Field Label" and "Field Name" fields are also highlighted in red. The "Field Label" and "Field Name" fields are also highlighted in red.

Create a Lightning App:

The screenshot shows the Salesforce Lightning App Builder interface for creating a new app. The page is titled "App Settings" and "App Details & Branding". It includes a navigation menu with "App Options", "Utility Items (Desktop Only)", "Navigation Items", and "User Profiles". The main content area contains a form for configuring the app. The form includes a "App Name" field with the value "EduConsultPro", a "Developer Name" field with the value "EduConsultPro", and a "Description" field. There are also checkboxes for "Org Theme Options" and "Use the app's image and color instead of the org's custom theme". The "App Name" and "Developer Name" fields are highlighted in red. The "Description" field is highlighted in red. The "App Name" and "Developer Name" fields are also highlighted in red. The "App Name" and "Developer Name" fields are also highlighted in red.

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4.Create an Approval Process for Property Object:

Submission Template:

The screenshot shows the Salesforce Email Template Builder interface for a "Submission Template". The top navigation bar includes a search bar and various utility icons. The left sidebar shows the "Sales" app and a list of tabs: Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, and "Submission Template" (which is active). The main content area is titled "Email Template Submission Template" and includes "Edit", "Clone", and "Delete" buttons. Below the title, there are two tabs: "Details" (selected) and "Related". The "Details" tab is divided into two sections: "Information" and "Message Content". The "Information" section contains fields for "Email Template Name" (Submission Template), "Description", "Related Entity Type" (Appointment - Appointment), "Folder" (Student Request Template), and a checkbox for "Made in Email Template Builder". The "Message Content" section contains fields for "Subject" and "Enhanced Letterhead". The "HTML Value" field contains the following text: "Dear {{{Appointment_c.Student_Name_e}}},
I hope this email finds you well. I am writing to confirm the details of our upcoming appointment scheduled for {{{Appointment_c.Appointment_DateTime}}} regarding {{{Appointment_c.PurposeTopic_c}}}.
Appointment Details:
Appointment No : {{{Appointment_c.Name}}},
Student Name : {{{Appointment_c.Student_Name_e}}},
Consultant Name : {{{Appointment_c.Consultant_c}}},
Date & Time : {{{Appointment_c.Appointment_DateTime_c}}},
Purpose : {{{Appointment_c.PurposeTopic_c}}}.

Rejection Template:

The screenshot shows the Salesforce Email Template Builder interface for a "Rejection Template". The top navigation bar includes a search bar and various utility icons. The left sidebar shows the "Sales" app and a list of tabs: Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, and "Rejection Template" (which is active). The main content area is titled "Email Template Rejection Template" and includes "Edit", "Clone", and "Delete" buttons. Below the title, there are two tabs: "Details" (selected) and "Related". The "Details" tab is divided into two sections: "Information" and "Message Content". The "Information" section contains fields for "Email Template Name" (Rejection Template), "Description", "Related Entity Type" (Appointment - Appointment), "Folder" (Student Rejection Template), and a checkbox for "Made in Email Template Builder". The "Message Content" section contains fields for "Subject" and "Enhanced Letterhead". The "HTML Value" field contains the following text: "Dear {{{Appointment_c.Student_Name_e}}},
I regret to inform you that your appointment request has been rejected.
Appointment Details:
Appointment No : {{{Appointment_c.Name}}},
Student Name : {{{Appointment_c.Student_Name_e}}},
Consultant Name : {{{Appointment_c.Consultant_c}}}.

Approval Template:

Sales

Home

Opportunities

Leads

Tasks

Files

Accounts

Contacts

Campaigns

Dashboards

Reports

Chatter

Approval Template

More

Search...

Star

Share

Help

Settings

Notifications

Profile

Email Template

Approval Template

EditCloneDelete

Details

Related

Information

Email Template Name

Approval Template

Description

Made in Email Template Builder

Related Entity Type

Appointment - Appointment

Folder

Student Approval Template

Message Content

Subject

Enhanced Letterhead

HTML Value

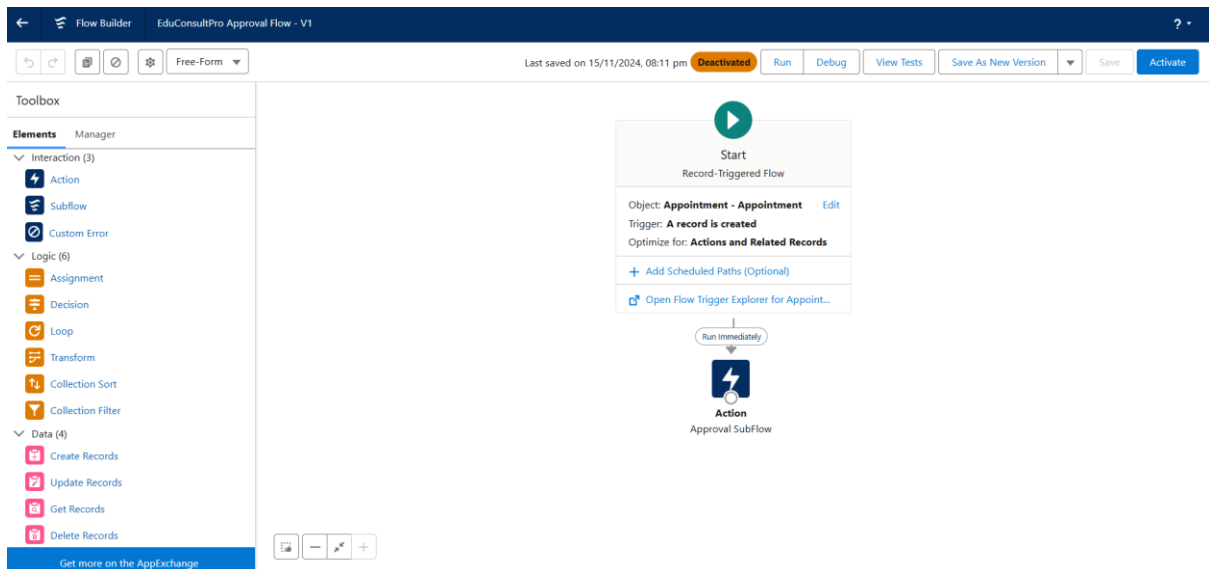
Dear {{{Appointment_c.Student_Name_c}}},

I am pleased to inform you that your appointment request has been approved.

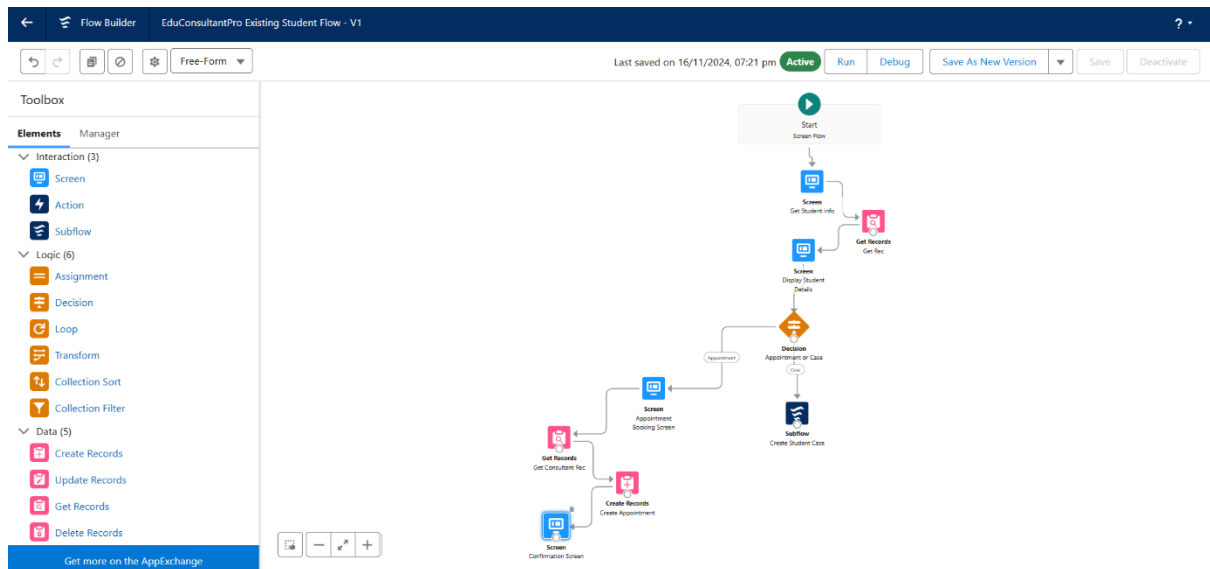
Appointment Details:
Appointment No : {{{Appointment_c.Name}}},
Student Name : {{{Appointment_c.Student_Name_c}}},
Consultant Name : {{{Appointment_c.Consultant_c}}}.

To Do List

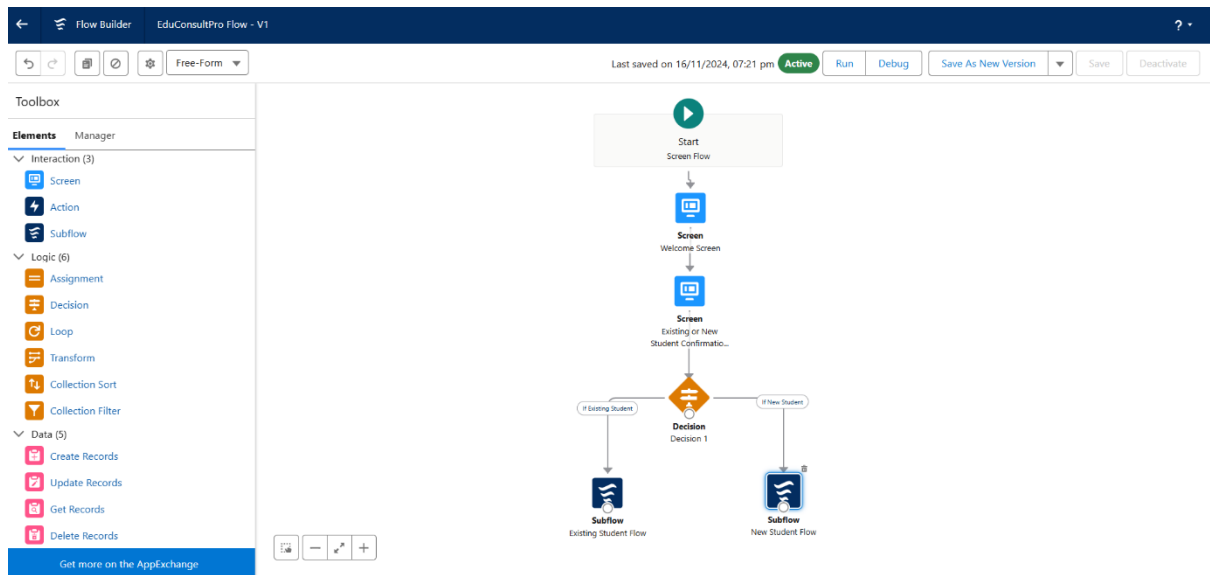
Create a Record Triggered Flow:



6.Create a ScreenFlow for Existing Student to Book an Appointment:



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



8.Create a lightning app page:

