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SERVICE HUB

A CRM App to manage services offered by institution

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PROJECT ABSTRACT

EduConsultPro Institute is implementing Servicehub, a robust Customer Relationship Management (CRM) solution built on Salesforce, to meet the increasing demand for streamlined student admissions, consulting services, and immigration case management. As the institute continues to welcome more prospective students annually, ServiceTrack will centralize core operations to enhance efficiency, improve communication, and simplify processes for both students and staff.

A primary function of Servicehub is Admission Application Management. Prospective students can submit applications through an online form integrated with Salesforce, which collects detailed personal information. Upon submission, applicants receive an automated email confirmation, while all data is securely stored, allowing easy access for the admissions team. Additionally, Salesforce's real-time reporting tools will enable staff to generate dashboards to analyze critical metrics, such as application trends, acceptance rates, and enrollment patterns.

Consulting Services Management is another essential feature of Servicehub. Students can request consulting services through the institute's website, specifying their preferences and interests. These requests are logged in Salesforce and automatically notify the relevant consultants. Within Salesforce, consultants can manage these requests, schedule appointments, check statuses, and monitor consulting activities, resulting in improved management and coordination of consulting services and timely support for students.

Furthermore, ServiceTrack will streamline Immigration Case Management for international students. The system will track immigration cases, helping ensure that visa applications and related documents are processed efficiently. Salesforce will allow staff to monitor case statuses, send automated reminders for document submissions, and maintain compliance with immigration policies. This functionality is designed to minimize processing errors and delays, enhancing the experience for international students.

1.INTRODUCTION

EduConsultPro Institute, known for its extensive educational offerings, is experiencing a significant increase in prospective student interest. To effectively manage the growing volume of admission applications, student inquiries, and consulting service requests, the institute is implementing ServiceHub, a Salesforce-based Customer Relationship Management (CRM) system. This project is focused on streamlining essential operational processes to improve overall efficiency and quality of service delivery.

ServiceHub will address three main areas:

1. Admission Application Management: Automating the application process to manage high volumes, capture detailed student information, send automated notifications, and generate insightful reports to support informed decision-making.
2. Consulting Services Management: Enhancing the handling of consulting requests to offer tailored guidance to students, enabling a seamless process for request submissions, scheduling, and managing consulting sessions.
3. Immigration Case Management: Optimizing the tracking and processing of immigration cases for international students, ensuring timely support and compliance with regulatory requirements.

The ServiceHub project includes several essential components, such as creating custom objects to structure data efficiently, designing intuitive screen flows to guide users through various processes, and establishing approval processes to ensure proper task handling. A unified interface will also be developed, along with a custom Lightning app page, to enhance the user experience and provide easy access to key functions.

By implementing ServiceHub, EduConsultPro aims to achieve greater operational efficiency, improved data management, and an enhanced experience for both students and staff. This system is designed to support the institute’s expanding needs and to ensure continued excellence in delivering educational services.

2.CREATING OBJECTS FROM SPREAD SHEET

Creating Objects from Spreadsheet

To streamline data organization in ServiceHub, EduConsultPro will set up custom objects from spreadsheets using Salesforce's built-in tools. This process allows for quick creation of objects and ensures accurate data mapping for various operational needs. Here's how it's done:

1. Creating the Course Object

- Go to Object Manager in Salesforce.
- Select Custom Object from Spreadsheet.
- Download the course data spreadsheet.
- Upload this file to Salesforce.
- Map each column in the spreadsheet to the relevant fields in Salesforce.
- Complete the process by uploading the mapped file, which will generate the Course object in ServiceHub.

2. Creating Additional Objects

- Repeat the same steps for additional objects like Consultant, Student, and Appointment:
  - Access Object Manager.
  - Use Create Object from Spreadsheet.
  - Download the required spreadsheet (e.g., Consultant, Student, Appointment).
  - Upload each file and map fields as needed.
  - Finalize each by uploading the file to create the respective objects in ServiceHub.

3. Establishing Lookup Relationships

- After creating objects, establish relationships among them to ensure data

connections across ServiceHub.

- Between Appointment and Student:
- In Object Manager, select Appointment.
- Go to Fields & Relationships, and select New.
- Choose Lookup Relationship and select Student as the related object.
- Complete the details and save the relationship.
- Between Appointment and Consultant:
- In Object Manager, select Appointment again.
- Under Fields & Relationships, choose New.
- Set up another Lookup Relationship and select Consultant as the related object.
- Complete the required fields and save.

4. Creating the Registration Object

- In Object Manager, select Create Custom Object.
- Name the object Registration.
- Add fields for necessary details such as Student ID and Course ID.
- Save the object to finish.

5. Building Lookup Relationship Between Student and Case

- Go to Object Manager and select Case.
- Under Fields & Relationships, choose New.
- Create a Lookup Relationship to Student and complete the setup.

These steps will build a foundational data structure within ServiceHub, supporting efficient handling of appointments, registrations, and cases in Salesforce.

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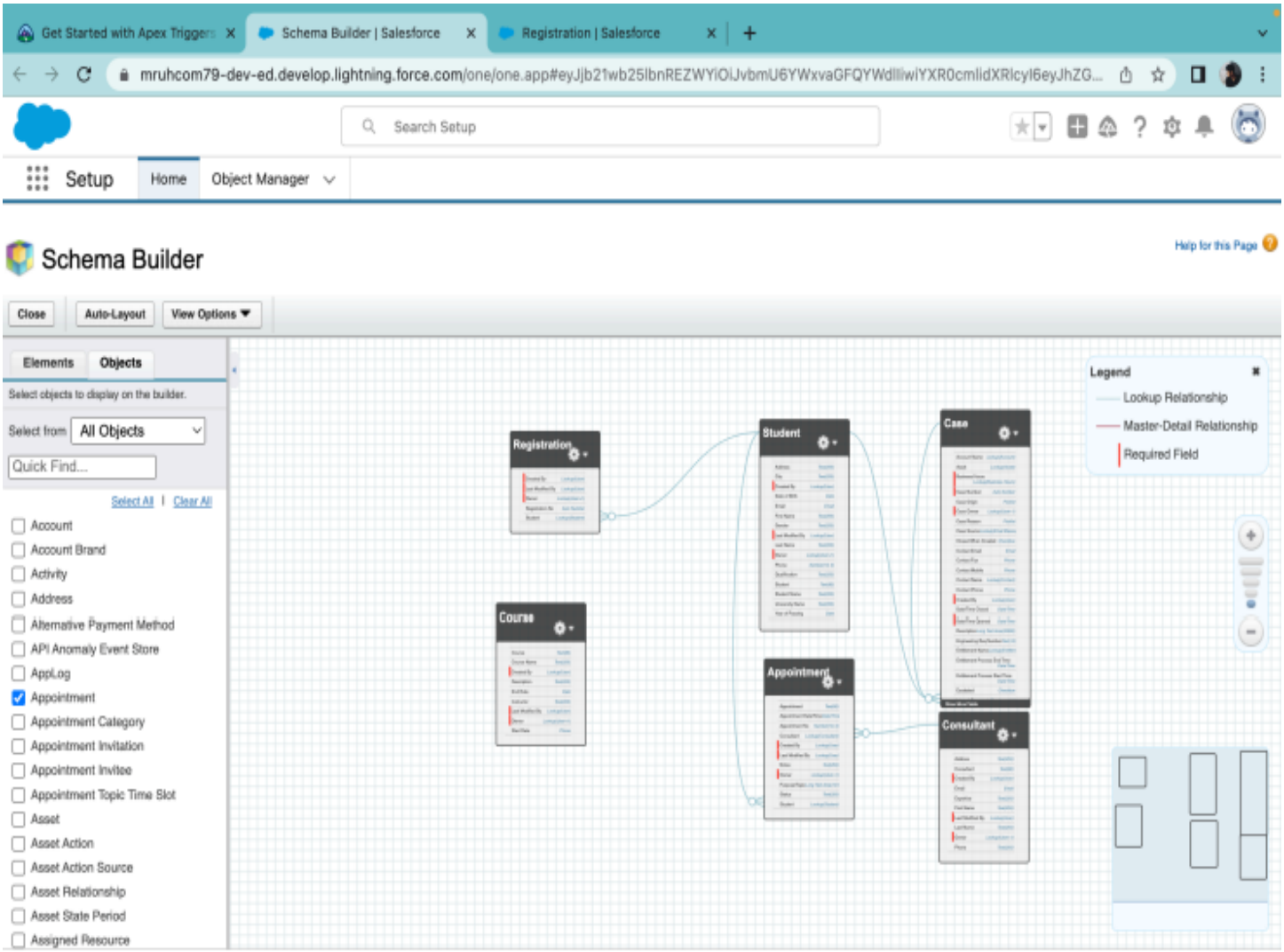


Configuring the Case Object for ServiceHub

1. Edit the Case Object:
    - Go to Object Manager in Salesforce.
    - Select Case from the list of objects.
2. Add Values to the "Type" Field:
    - Under Fields & Relationships in the Case object, locate and select the Type field.
    - Click New to add options.
    - Add the following values:
        - Immigration
        - Visa Application
3. Add Status Values:
    - Go back to Fields & Relationships and open the Status field.
    - Click New to enter new options.
    - Add these status values:
        - Open
        - In-Progress
        - Closed
4. Set Up the Case Object in ServiceHub:
    - These new fields and values allow the Case Object in ServiceHub to effectively manage and monitor student immigration and visa processes, ensuring that key steps in each case are tracked and that compliance with procedural timelines is maintained.

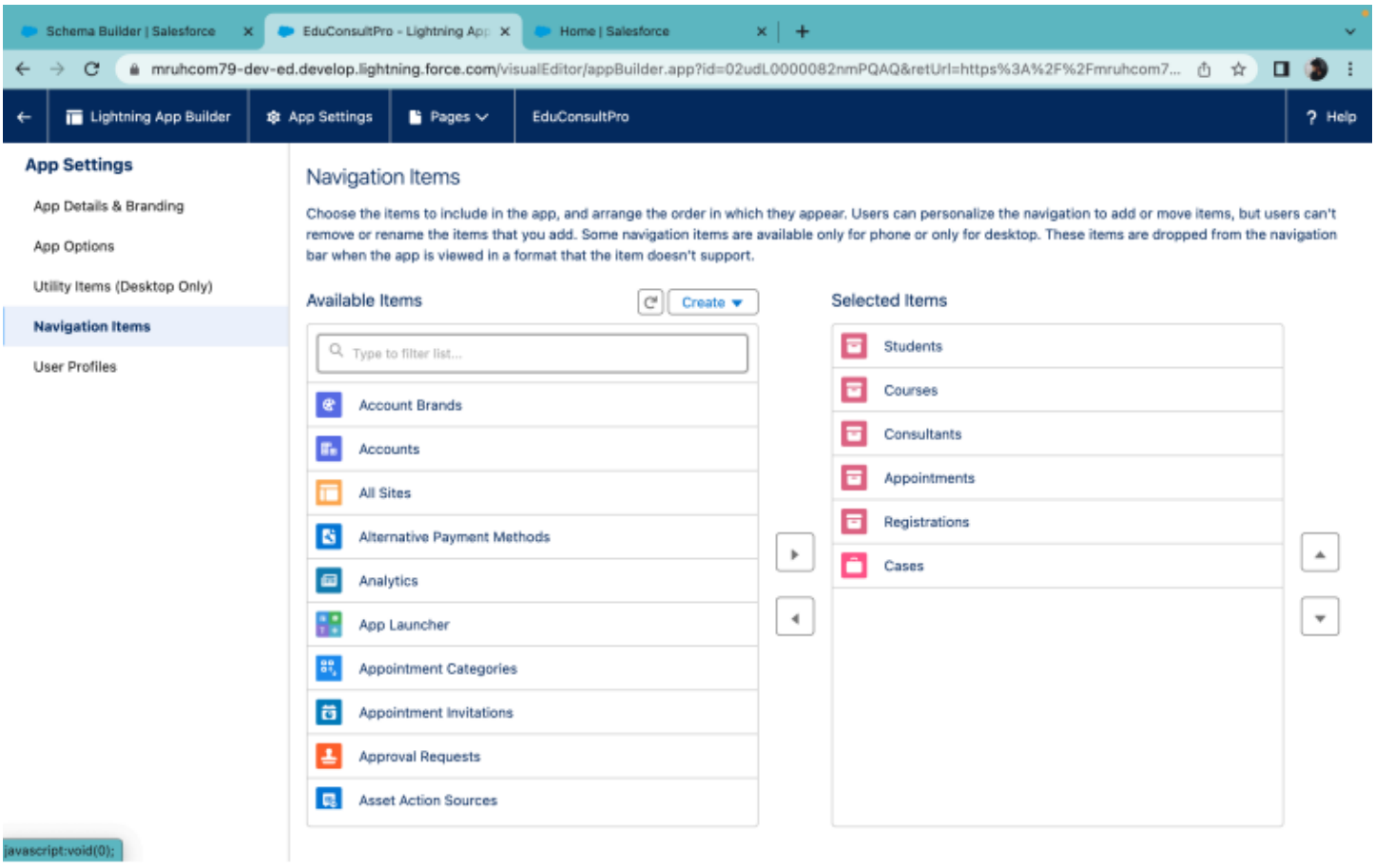
Setting Up a Lightning App

Steps:

1. Access Setup:
    - In Salesforce, go to Setup.
    - In the Quick Find box, search for and select App Manager.
2. Create a New Lightning App:
    - Click New Lightning App.
    - Name the app EduConsultPro.

- Click Next three times to move through the initial setup screens.

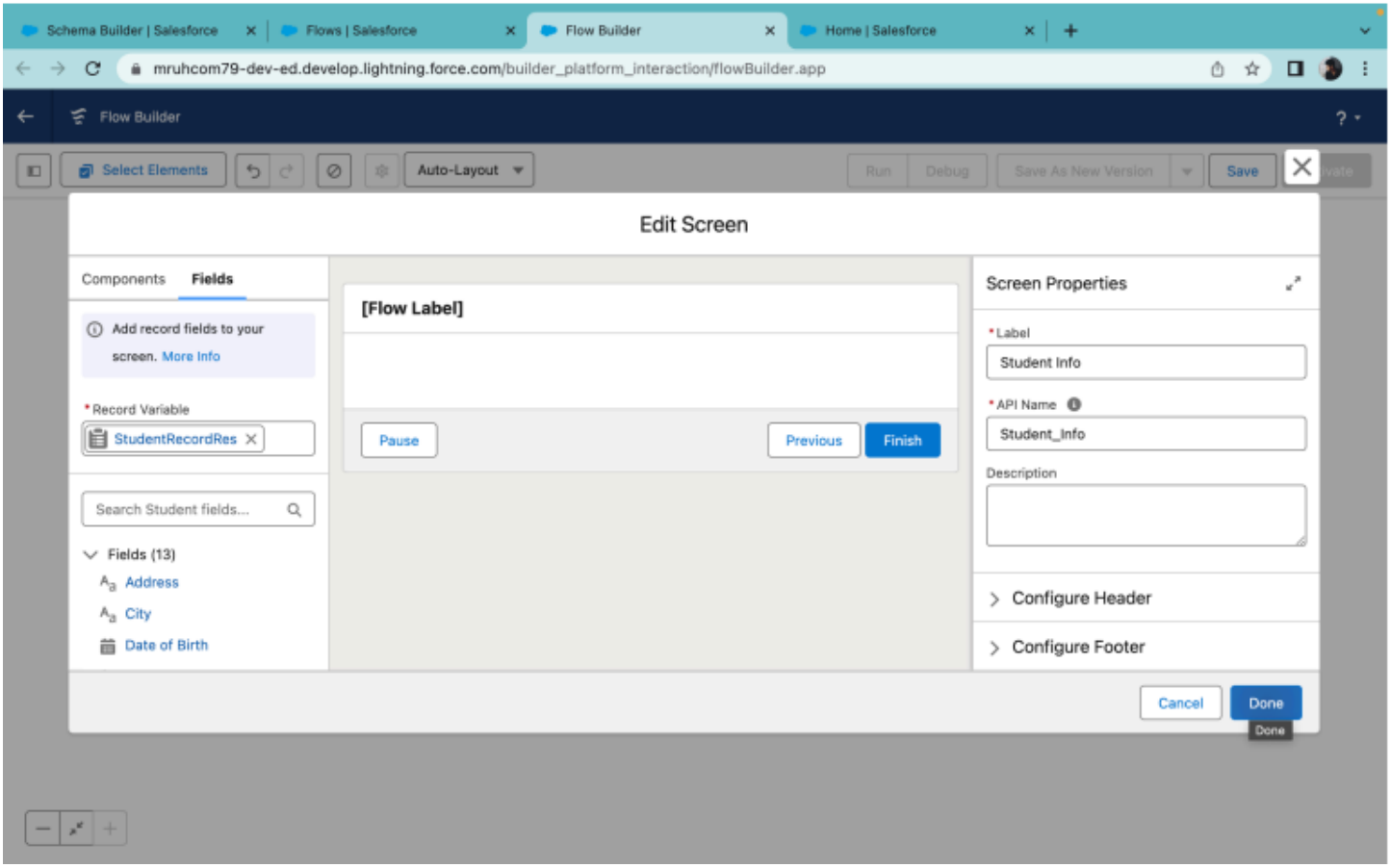
3. Add Items to the App:
   - In the Available Items section, select and add the following items to the Selected Items list:
     - Home
     - Students
     - Courses
     - Consultants
     - Appointments
     - Registrations
     - Cases
4. Assign Profiles to the App:
   - In the Available Profiles section, find System Administrator and add it to Selected Profiles.
5. Save and Finalize:
   - Click Save & Finish to complete the app setup.



3.CREATE A SCREENFLOW FOR ADMISSION APPLICATION PROCESS.

Steps:

1. Create a New Screen Flow:
    - Go to Setup in Salesforce.
    - 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:
    - In Flow Builder, drag the Screen element from the left sidebar onto the canvas.
    - In the Screen Properties pane, enter Student Info for the Label.
3. Create a New Resource:
    - Click on the Record Variable option to create a new resource.
    - Name the resource StudentRecordRes.
    - Select Record as the resource type.
    - For the Object, select Student.
4. Add Fields to the Screen:
    - Drag the necessary fields from the Fields tab onto the screen to collect student information.
    - Suggested fields may include:
        - First Name
        - Last Name
        - Email
        - Phone
5. Configure and Save the Screen Flow:
    - Configure any additional properties or settings for the screen as needed.
    - Once satisfied with the configuration, click Save to save your Screen Flow.

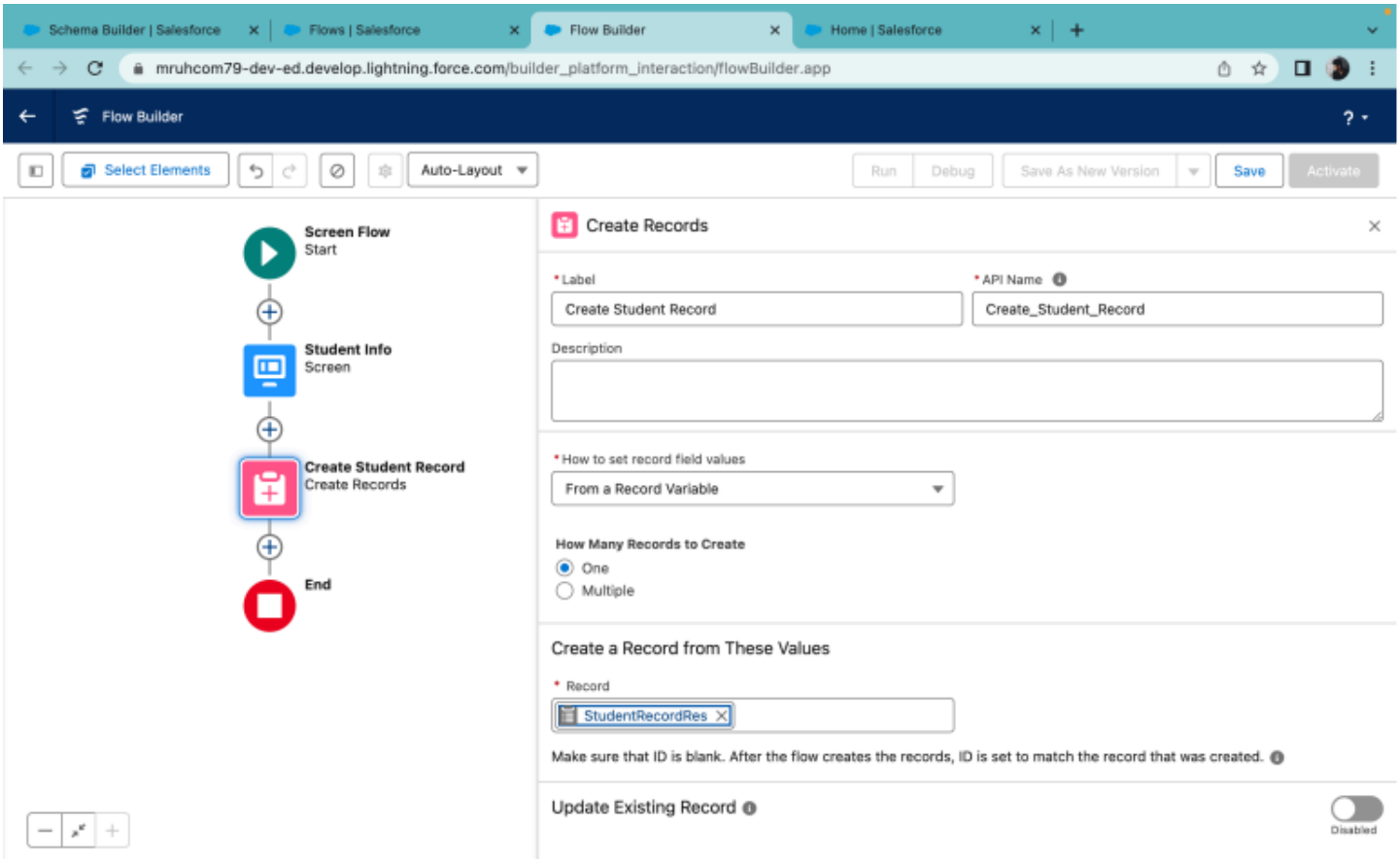


Creating Student Record Using Create Element

Steps:

1. Add a Create Element:
   - In the Flow Builder, confirm that the Student Info Screen element is already added to the flow.
   - Drag the Create Records element from the left sidebar onto the canvas, placing it after the Student Info Screen element.
2. Label the Create Element:
   - In the Create Records properties pane, label it as Create Student Record.
3. Configure the Create Element:
   - For How many records to create, select One.
   - For How to Set the Record Fields, select Use all values from a record.
4. Set the Record Variable Resource:
   - Under Create a Record from These Values, select the record variable resource

StudentRecordRes that was created in the Student Info screen.

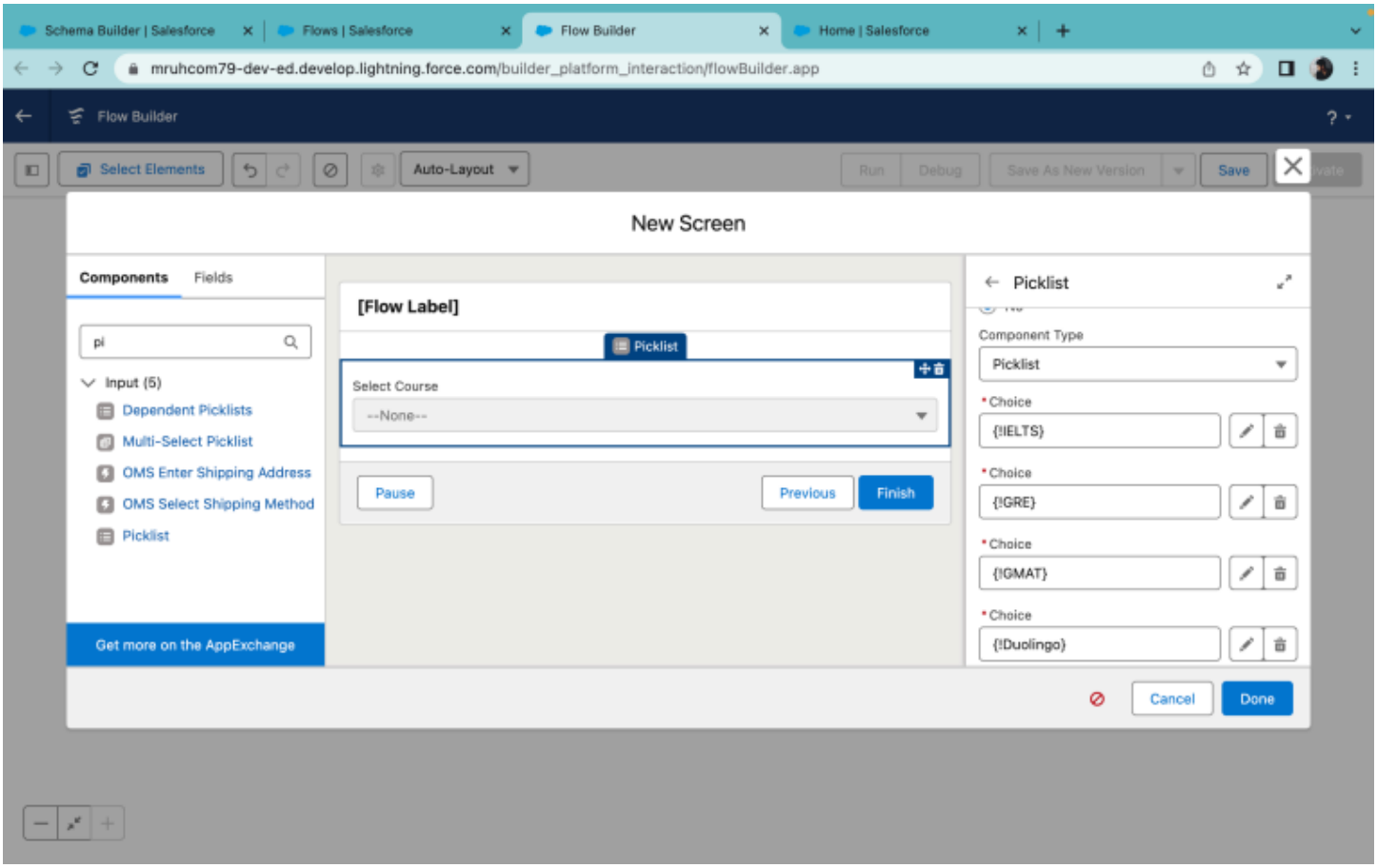


Add Screen Element

Steps:

1. Add a Screen Element:
   - In Flow Builder, drag a Screen element from the left sidebar onto the canvas, placing it after the Create Student Record element.
   - In the Screen Properties pane, label this screen as Course Screen.
2. Add a Picklist Component:
   - On the Course Screen, drag the Picklist component from the left sidebar onto the screen.
   - Label the Picklist component as Select Course.
3. Configure the Picklist Choices:
   - In the Choices section of the Picklist component, click on + Add Choice.
   - For the first choice, type IELTS and press Enter, which will automatically create a variable named IELTS.

- Repeat this step for each of the following choices:
  - GRE
  - GMAT
  - Duolingo



Steps:

1. Add a Decision Element:
   - In Flow Builder, drag a Decision element from the left sidebar onto the canvas, placing it after the Course Screen element.
   - In the Decision Properties pane, label it as Selecting Course.
2. Configure the Decision Outcomes:
   - . Outcome 1:
     - Label: Selected IELTS.
     - Resource: Select_Course (the Picklist component from the Course Screen).
     - Operator: Equals.
     - Value: {!IELTS} (the choice variable created from the Course Screen).

- ■. Click on + Add Outcome to add a new outcome.
    - Label: Selected GRE.
    - Resource: Select_Course.
    - Operator: Equals.
    - Value: {!GRE}.
- ■. Repeat the above step for the remaining choices:
    - ■ Outcome Label: Selected GMAT
        - ■ Resource: Select_Course
        - ■ Operator: Equals
        - ■ Value: {!GMAT}
    - ■ Outcome Label: Selected Duolingo
        - ■ Resource: Select_Course
        - ■ Operator: Equals
        - ■ Value: {!Duolingo}
    - ■ Outcome Label: Selected TOEFL
        - ■ Resource: Select_Course
        - ■ Operator: Equals
        - ■ Value: {!TOEFL}
- ■. Click Done to complete the configuration of the Decision element.

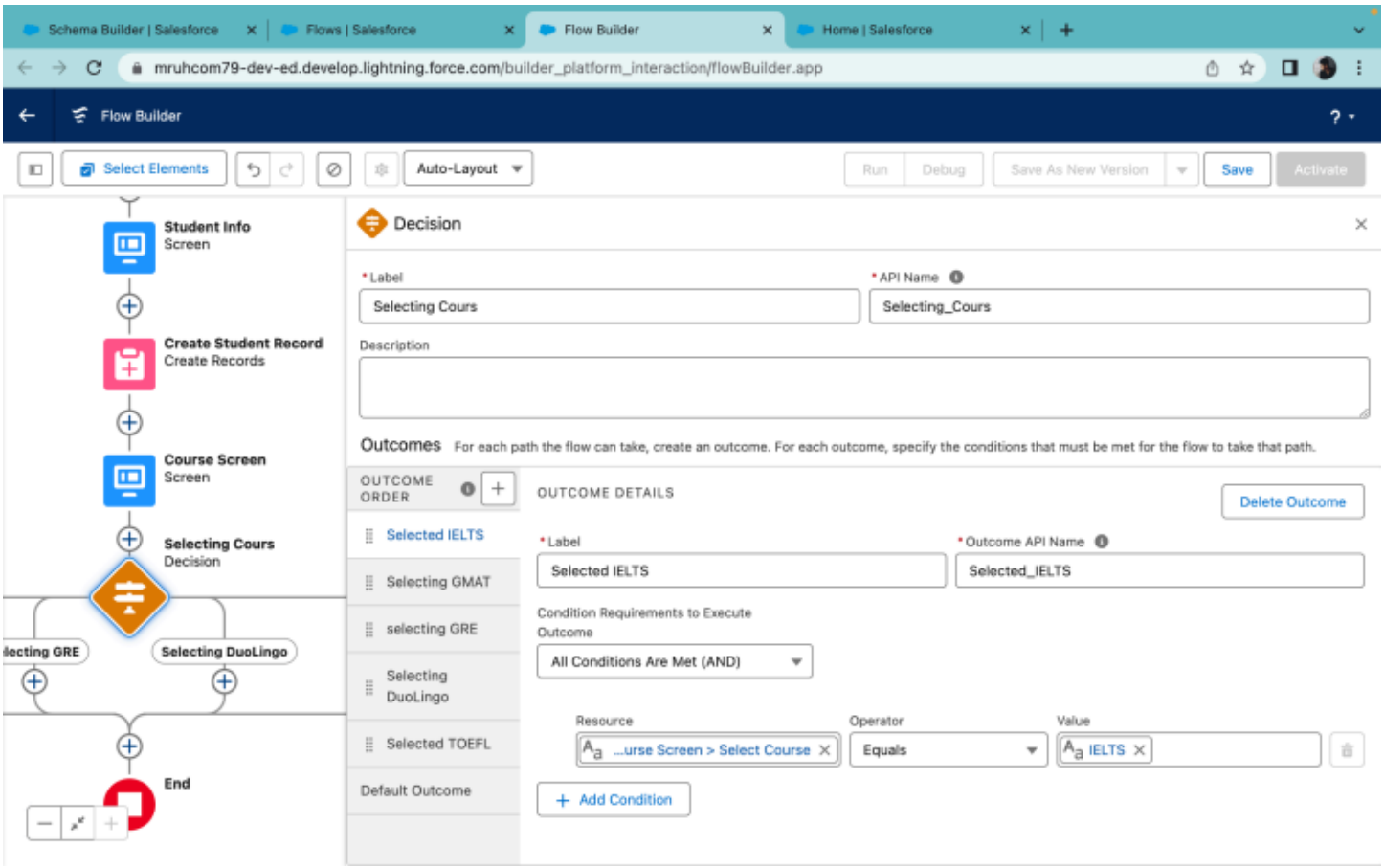
3.5 Add GET Record Element

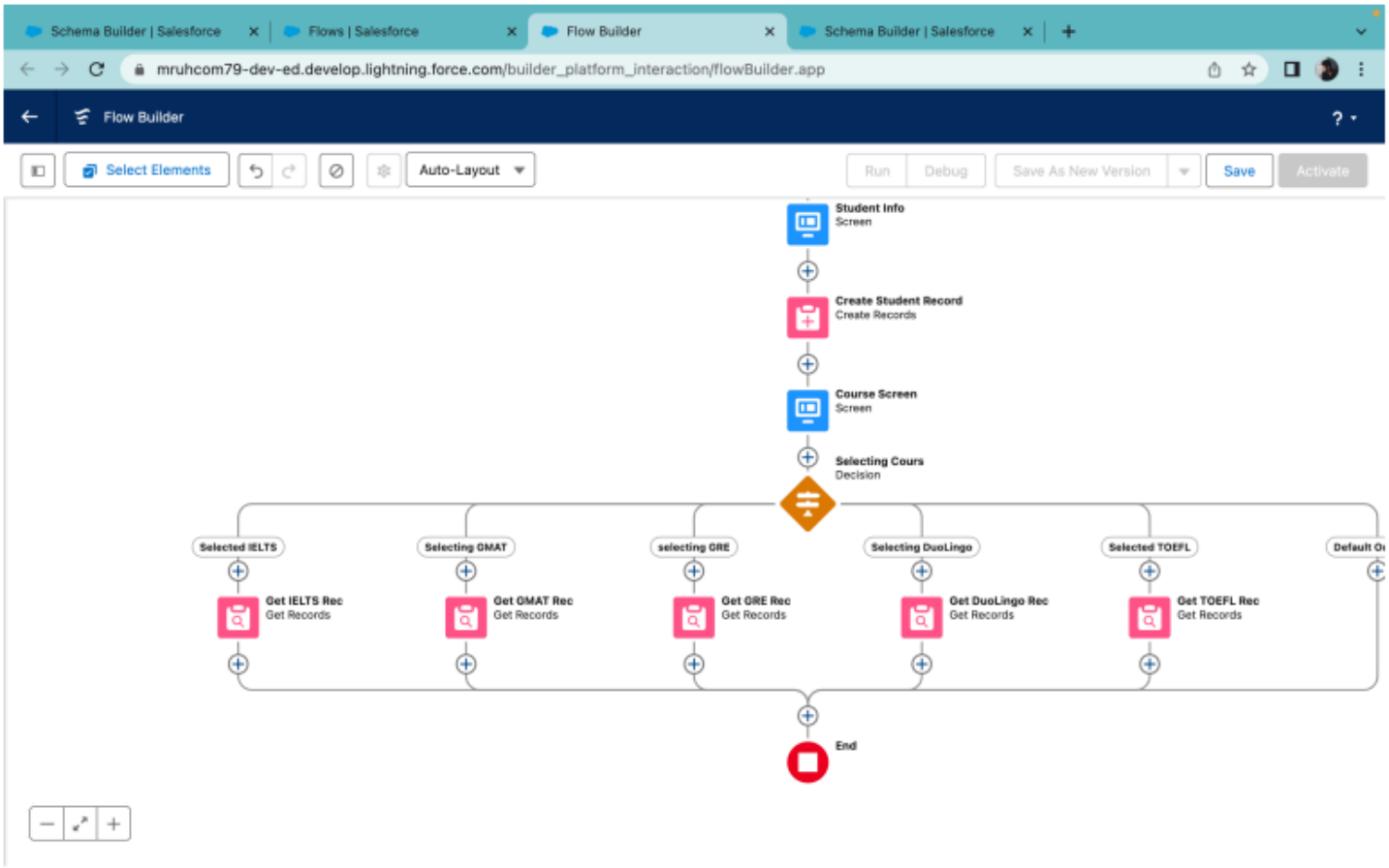
Steps:

1. Add a GET Record Element:
    - ■ In Flow Builder, drag a Get Records element from the left sidebar onto the canvas, placing it under the Selecting Course Decision element on the Selected IELTS path.
    - ■ In the Get Records Properties pane, label it as Get IELTS Rec.
2. Configure the GET Record Element:
    - ■ Object: Select Course.
    - ■ Condition Requirements: Choose All Conditions Are Met (AND).
3. Add Condition:
    - ■ Field: Select Course Name.

- Operator: Choose Equals.
- Value: Set to {!Select_Course} (the Picklist component from the Course Screen).

4. Repeat for Other Paths:
   - Repeat the steps above for each of the remaining paths (GRE, GMAT, TOEFL, Duolingo) by creating additional Get Records elements:
     - For the Selected GRE path, label it as Get GRE Rec.
     - For the Selected GMAT path, label it as Get GMAT Rec.
     - For the Selected Duolingo path, label it as Get Duolingo Rec.
     - For the Selected TOEFL path, label it as Get TOEFL Rec.





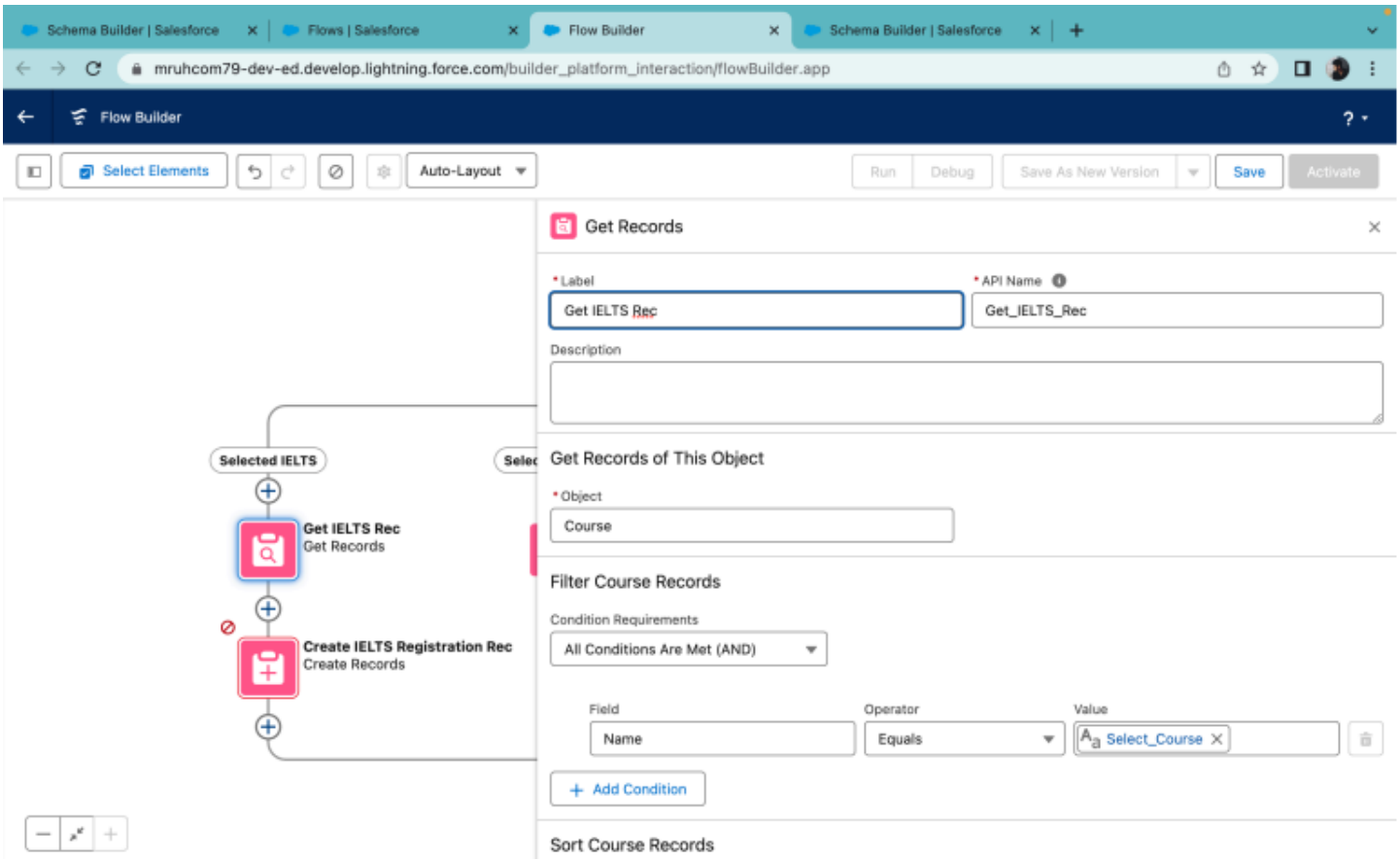
Create Registration Record Using Create Records Element

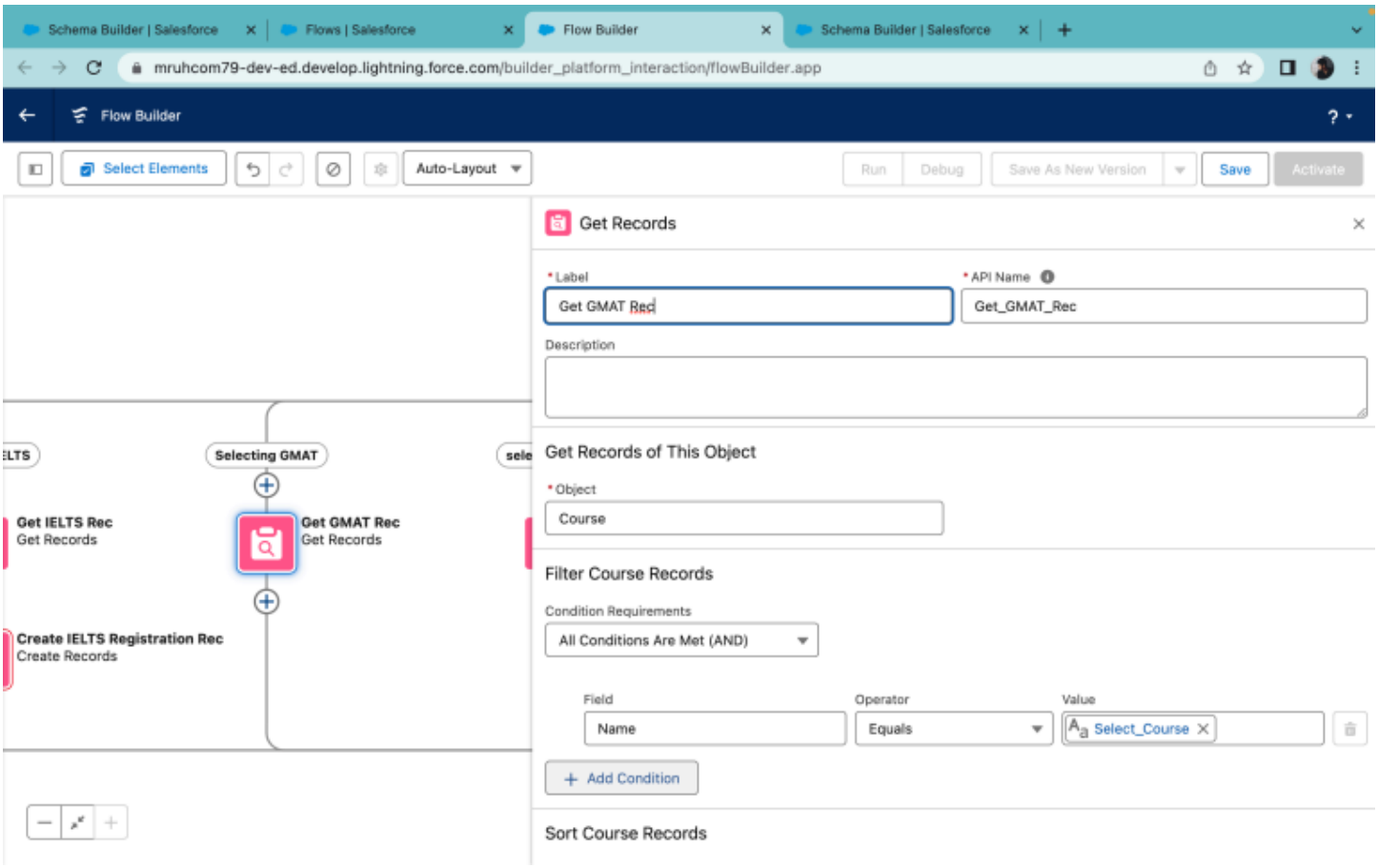
Steps:

1. Create Element for IELTS:
   - In Flow Builder, drag a Create Records element from the left sidebar onto the canvas, placing it after the Get IELTS Rec element.
   - In the Create Records Properties pane, label it as Create IELTS Registration Rec.
2. Configure the Create Element for IELTS:
   - How many records to create: Choose One.
   - How to Set the Record Fields: Select Use separate resources, and literal values.
   - Object: Choose Registration.
3. Add Fields for IELTS Registration:
   - Field: Enter Course_Name__c.
     - Value: Set to {!Get_IELTS_Rec.Id} (to reference the ID of the retrieved IELTS course).

- Field: Enter Student_Name__c.
    - Value: Set to {!StudentRecordRes.Id} (to reference the ID of the student record).
- Click Done to finish the configuration of the Create element for IELTS.

These steps will guide you in setting up a Create Records element to register the selected course for the student, specifically for the IELTS course. Repeat similar steps for GRE, GMAT, Duolingo, and TOEFL as needed.

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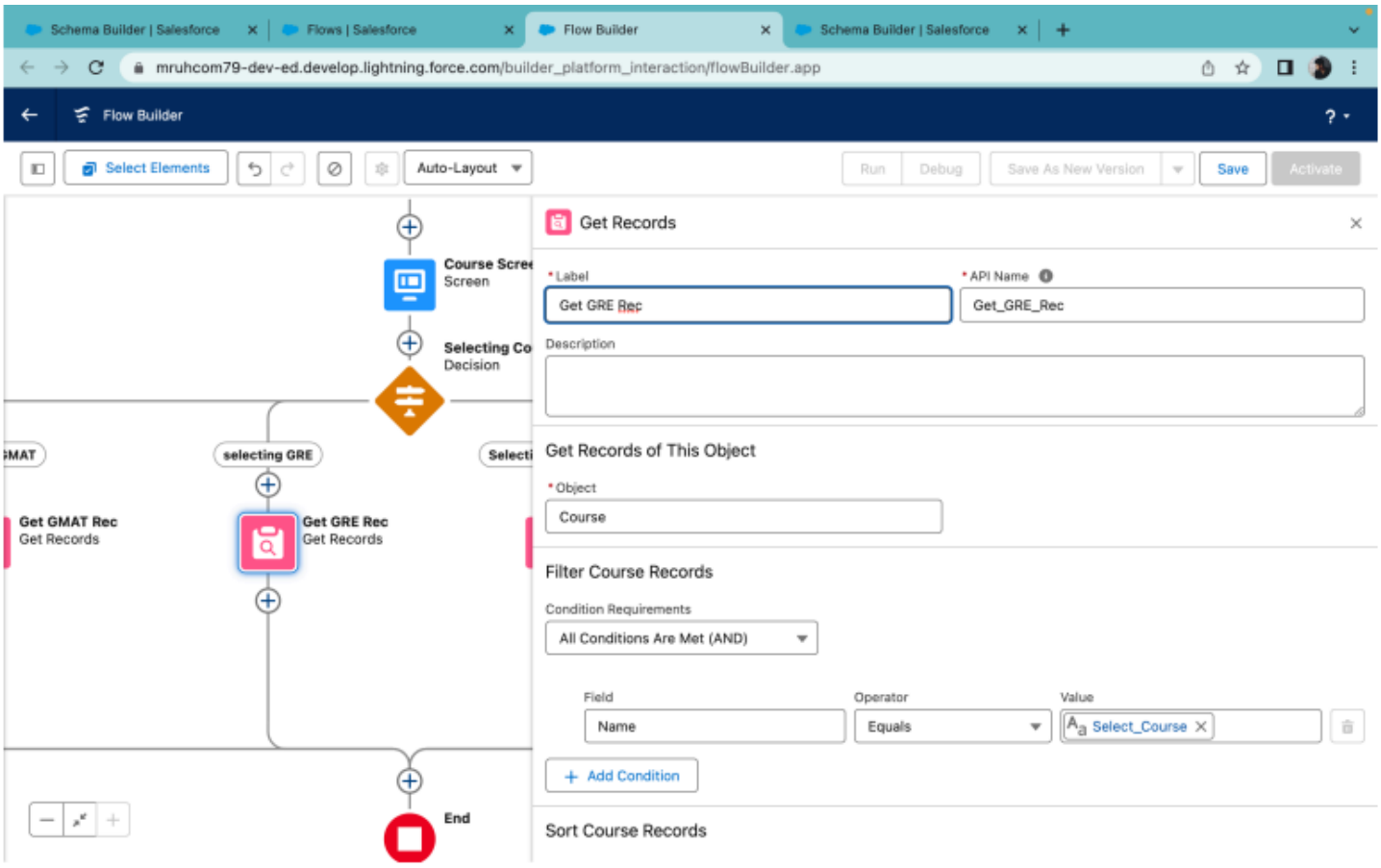
Add Condition
Sort Course Records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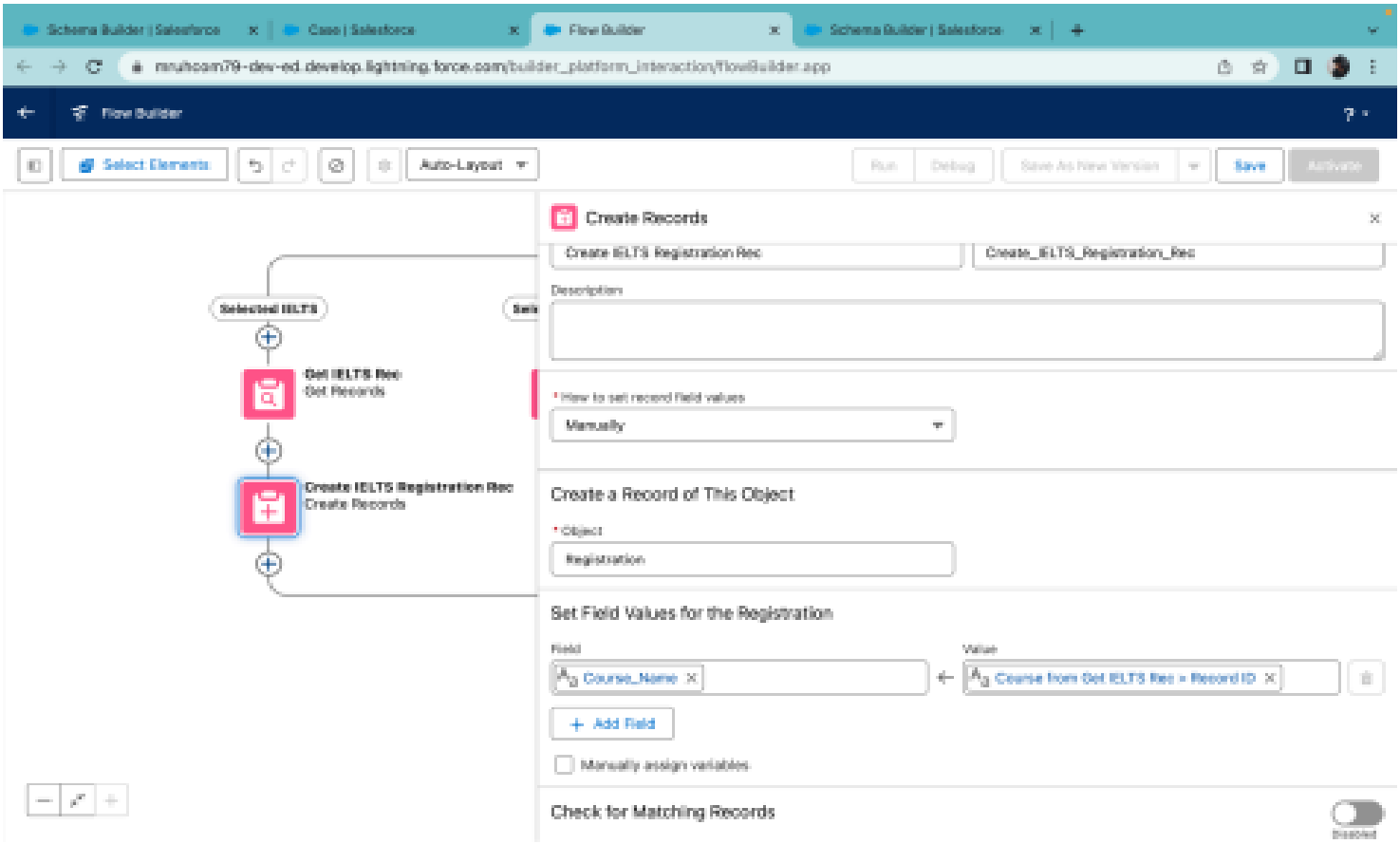
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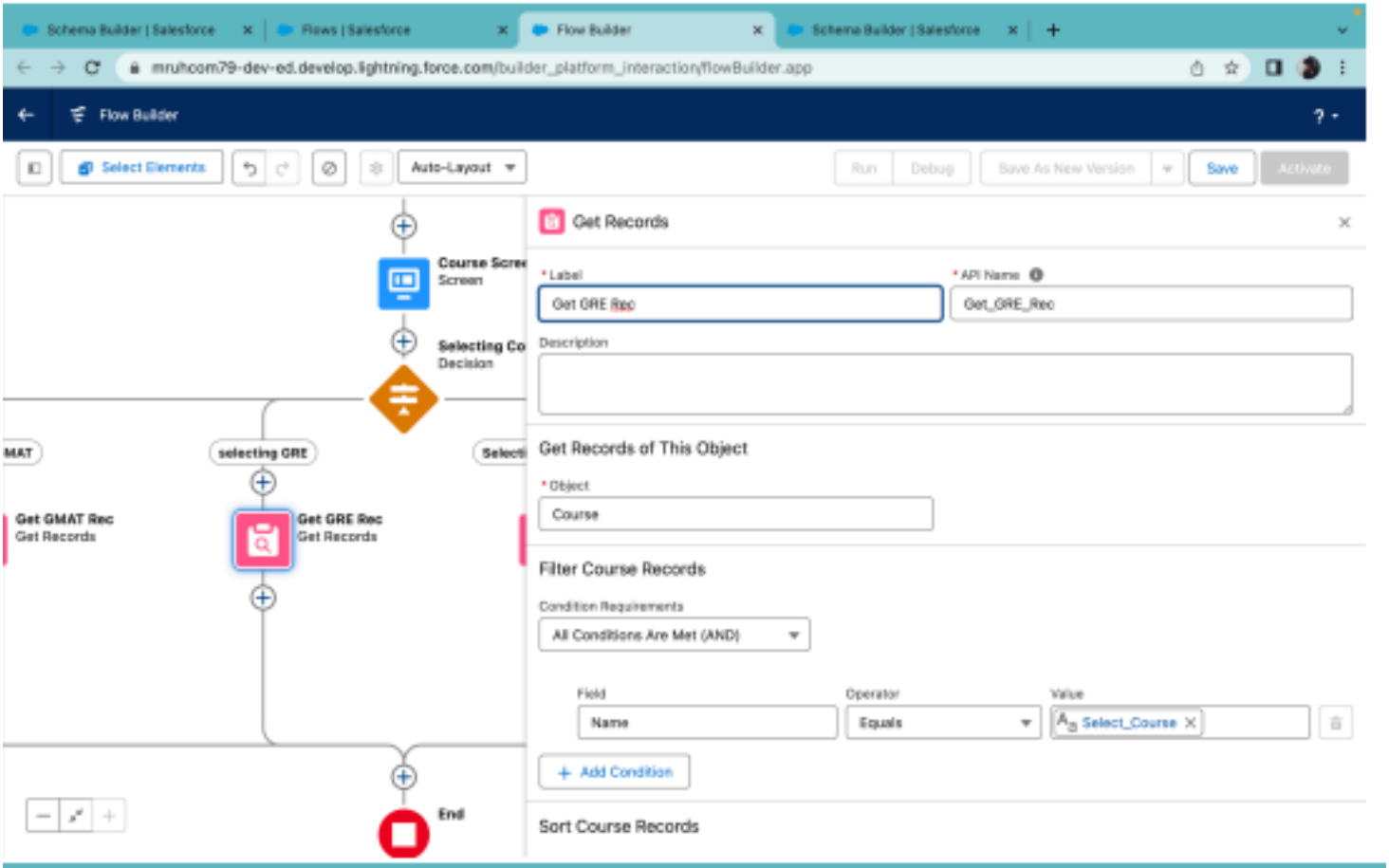
Manually
Create a Record of This Object
* Object
Registration
Set Field Values for the Registration
Field
Value
Course_Name
Course from Get IELTS Rec + Record ID
Add Field
Manually assign variables
Check for Matching Records
Disabled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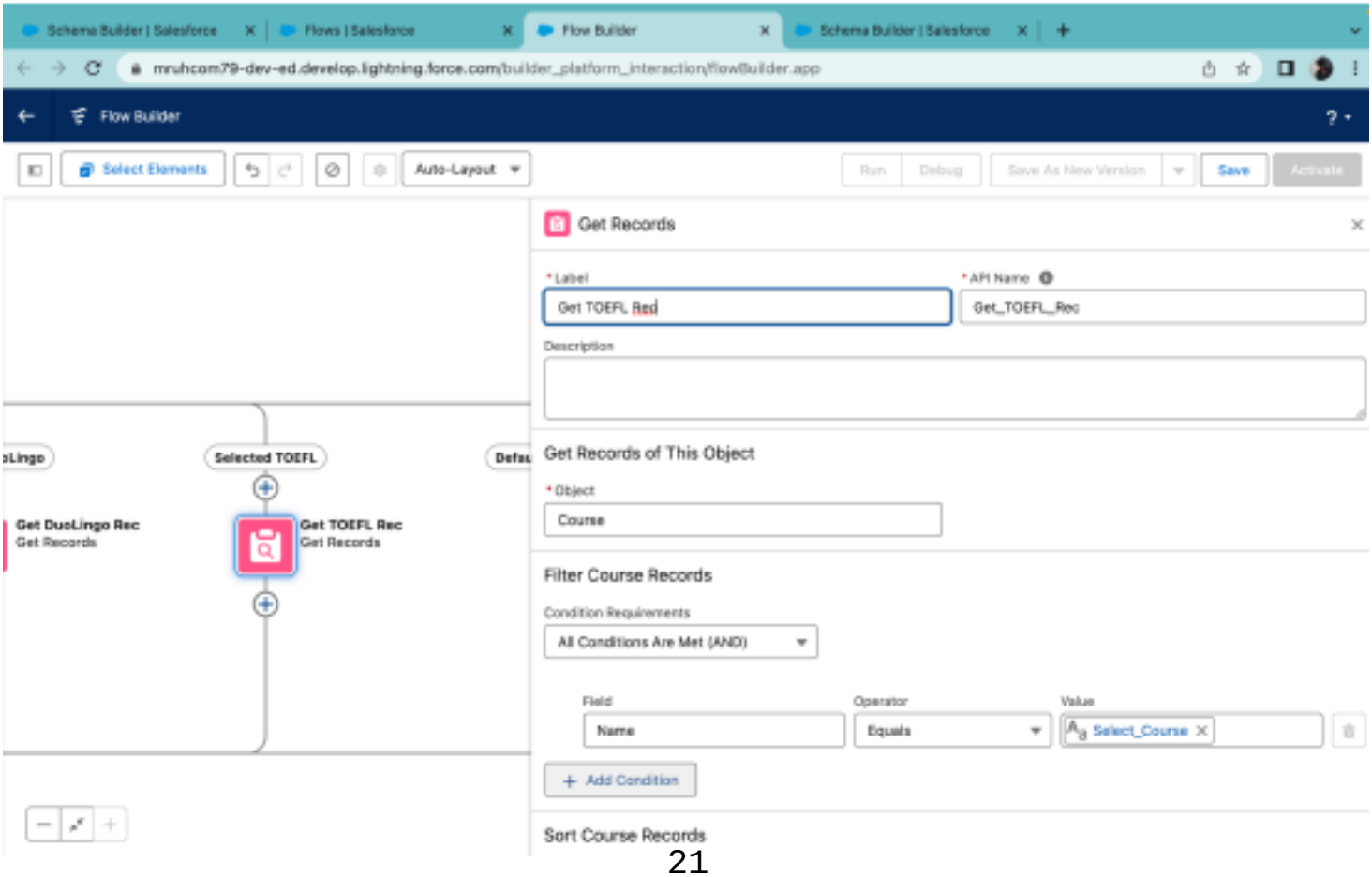
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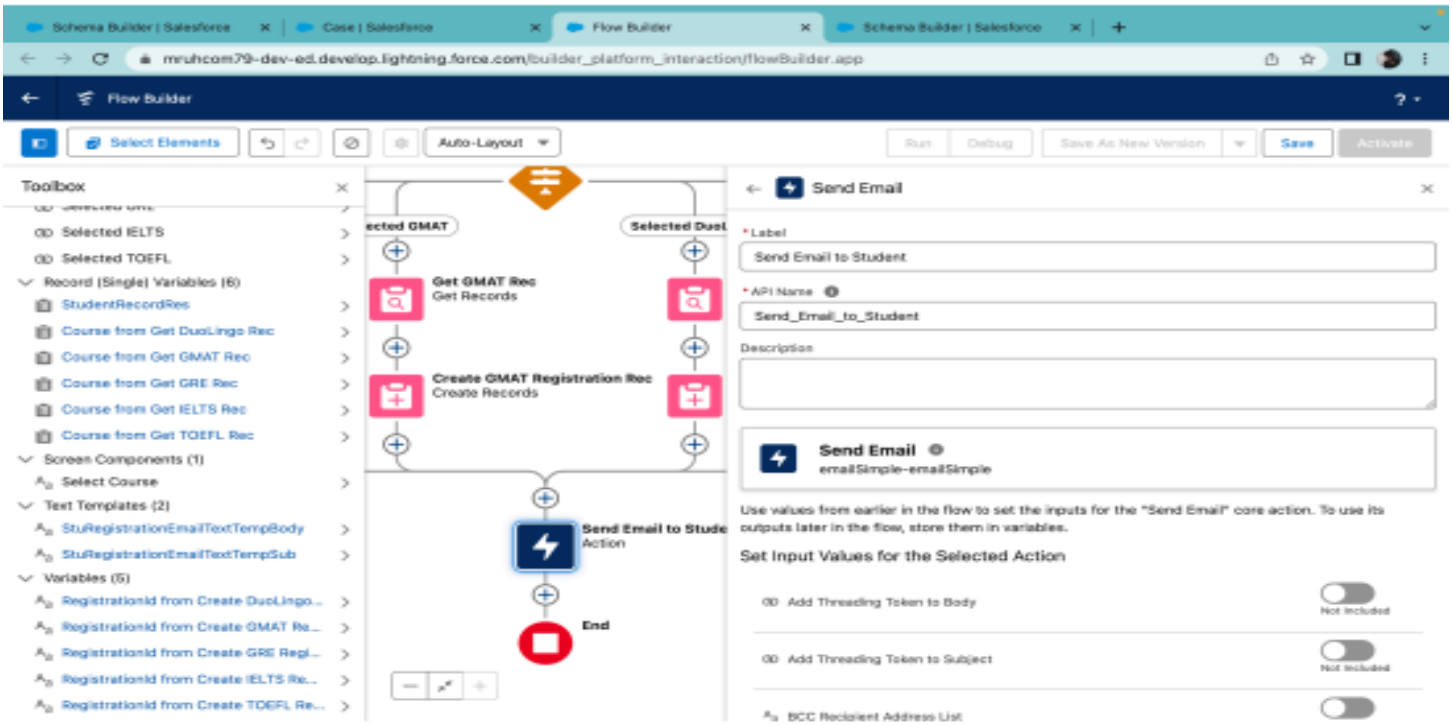
Get Records of This Object
* Object
Course
Filter Course Records
Condition Requirements
All Conditions Are Met (AND)
Field
Name
Operator
Equals
Value
Select_Course
+ Add Condition
Sort Course Records

3.8 Add an Action Element

Steps:

1. Add an Action Element:
    - In Flow Builder, drag an Action element from the left sidebar onto the canvas, placing it after all the Decision paths (IELTS, GRE, GMAT, TOEFL, Duolingo).
    - In the Action Properties pane, label it as Send Email to Student.
2. Configure the Action Element:
    - Action Type: Choose Send Email (or the relevant email action available in your Salesforce instance).
3. Set Input Values:
    - Body:
        - Set the input value to {!StuRegistrationEmailTextTempBody} (the Text Template created earlier).
    - Recipient Address List:
        - Set the input value to {!StudentRecordRes.Email__c} (the student's email address).
    - Subject:
        - Set the input value to {!StuRegistrationEmailTextTempSub} (create or specify this variable if it isn't already made).
4. Click Done:
    - After configuring the input values, click Done to finalize the Action element setup.



3.9 Add Screen Element

Add a Screen Element:

1. Within the Flow Builder, drag a Screen element from the left sidebar onto the canvas, placing it after the Send Email to Student Action element.
2. In the Screen Properties pane, name it as Success Screen.

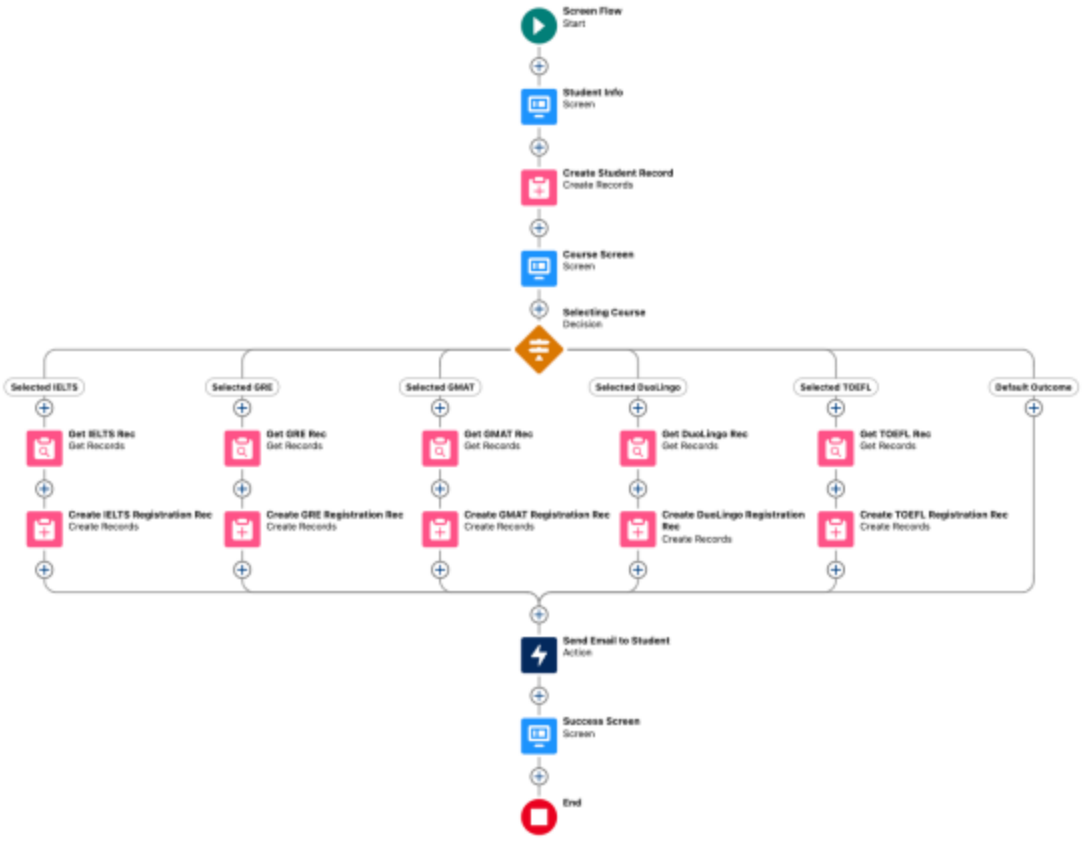
Add Display Text Component:

1. In the left sidebar, look for the Display Text component.
2. Drag the Display Text component into the Success Screen panel.

Configure the Display Text Component:

1. Label: Set the label as SuccessMessage.
2. Text: In the Resource Picker box, enter:
   - Dear {!StudentRecordRes.Name},
   - Congratulations and welcome to EduConsultantPro!
   - We are thrilled to inform you that your registration on our platform has been successfully completed. You are now a member of our esteemed community dedicated to helping students like you achieve your educational and immigration goals.
   - Your registration details have been sent via email; please check your inbox.

- Thank you.


Screen Flow
Start
Student Info
Screen
Create Student Record
Create Records
Course Screen
Screen
Selecting Course
Decision
Selected IELTS
Selected GRE
Selected GMAT
Selected DuoLingo
Selected TOEFL
Default Outcome
Get IELTS Rec
Get Records
Get GRE Rec
Get Records
Get GMAT Rec
Get Records
Get DuoLingo Rec
Get Records
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Get Records
Create IELTS Registration Rec
Create Records
Create GRE Registration Rec
Create Records
Create GMAT Registration Rec
Create Records
Create DuoLingo Registration Rec
Create Records
Create TOEFL Registration Rec
Create Records
Send Email to Student
Action
Success Screen
Screen
End

4.CREATE USER

4.1 User Creation

Navigate to User Creation:

1. Access Setup by clicking the gear icon in the upper right corner.
2. Under the Administration section, choose Users.
3. Click on New User.

Enter User Details:

1. Last Name: Input Consultant.
2. License: Choose Salesforce Platform.
3. Profile: Select Standard Platform User.

Fill in Mandatory Fields:

1. Complete all additional required fields (e.g., First Name, Email, Username) necessary for user creation.

Save the User:

1. Click Save to create the new user.

4.2 Configure User Settings

Navigate to User Settings:

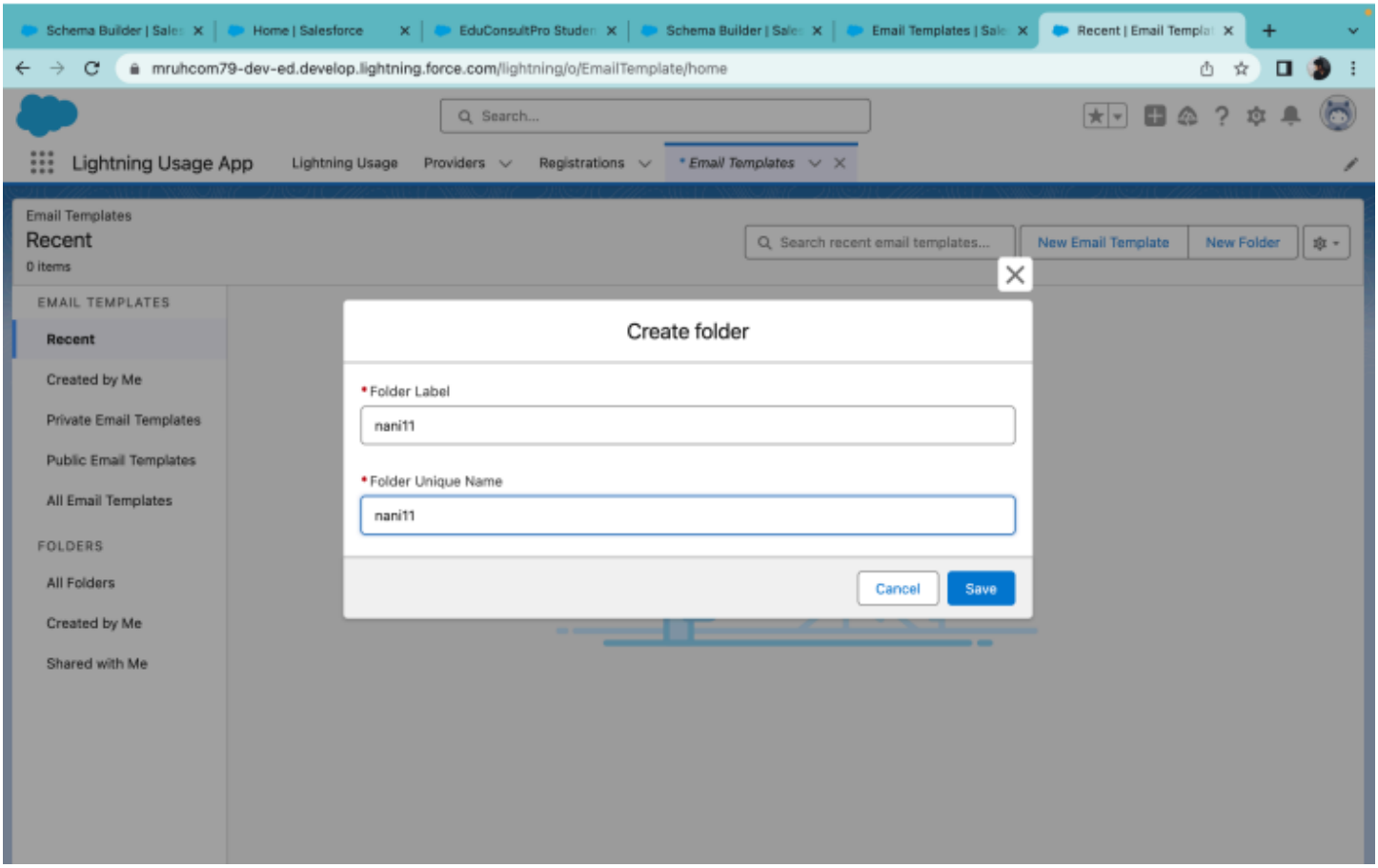
1. Access Setup.
2. Under Administration, choose Users.
3. Locate the user record for the newly created user and click Edit next to their name.

Update Approver Settings:Set Manager as Consultant:

1. In Setup, go to Users.
2. Locate the specific user and click Edit.
3. In the Manager field, select Consultant from the dropdown menu.

Save Changes:

1. Click Save to apply the changes.



5.Create an Approval Process for Property Object

5.1 Create an Email Template

Enable Lightning Email Templates:

1. Access Setup by clicking the gear icon in the upper right corner.
2. Type Email Templates into the Quick Find box and select it.

Create a New Folder for Templates:

1. Open the App Launcher by clicking the grid icon in the top left corner.
2. Search for Email Templates and select it.
3. Click New Folder.
4. Enter a name for the folder and click Save.

Create a New Email Template:

1. In the Email Templates section, click New Email Template.
2. Choose the folder you created in the earlier steps.

Configure the Email Template:

1. Email Template Name: Enter Submission Template.
2. HTML Value: Paste the specific HTML content or body text for your email template.

These steps will assist you in setting the manager for the user and creating a dedicated folder and email template for effective communication. Let me know if you would like to proceed with additional configurations for the email content!

Email Content:

Dear {{Appointment_c.Student_Name_c}},

I hope this email reaches you in good spirits. 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 eager to meet with you 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 dedicated to providing you with the support and guidance you need.

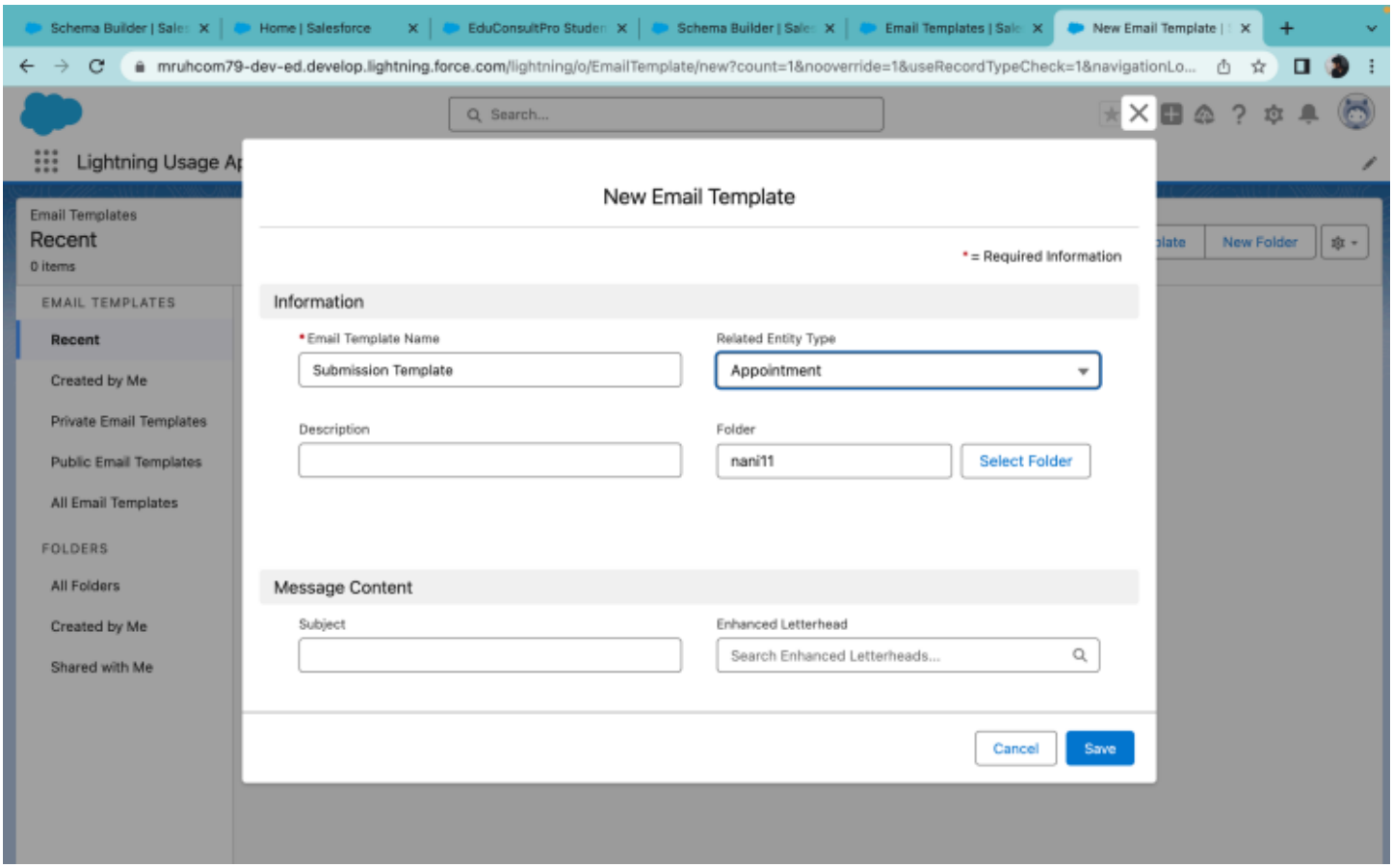
If there are specific topics or questions you wish to discuss during our appointment, please feel free to share them with me ahead of time. This will ensure our time together is as productive and beneficial as possible.

Should you need to reschedule or cancel our appointment for any reason, please inform me at your earliest convenience so we can make alternate arrangements.

Thank you once again for choosing to collaborate with me on this matter. I am confident that our partnership will yield positive results and progress toward your goals.

If you have any questions or need further information prior to our scheduled appointment, please don’t hesitate to contact me.

Looking forward to our meeting!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Public Email Templates
All Email Templates
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All Folders
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Shared with Me
New Folder
New Email Template
* = Required Information
Information
* Email Template Name
Submission Template
Related Entity Type
Appointment
Description
Folder
nani11
Select Folder
Message Content
Subject
Enhanced Letterhead
Search Enhanced Letterheads...
Cancel
Save

5.2 Create an Approval Process

Navigate to Approval Processes:

1. Access Setup by clicking the gear icon in the upper right corner.
2. In the Quick Find box, type Approval Processes and select it.

Select the Object:

1. Under Manage Approval Processes For, choose Appointment.

Create a New Approval Process:

1. Click New Approval Process and select Use Jump Start Wizard.

Configure the Approval Process:

1. Process Name: Enter Appointment Approval.
2. Description: Enter Rejection Notification Email Alert.
3. Unique Name: This will auto-populate.

Set Email Alert for Rejection Notification:

1. Email Template: Choose Rejection Template.
2. Recipient Type: Select Your Name.
3. Save to finalize the rejection actions.

Select Approver:

1. For the option to automatically assign an approver using a standard or custom hierarchy field, select Manager.
2. Click Next, and in the Automated Approver Determined By field, select Manager again.

Set Record Editability Properties:

1. Under Record Editability Properties, select either Administrators or the currently assigned approver can edit records during the approval process.
2. Click Save to complete the initial setup of the approval process.

View Approval Process Details:

1. Click View Approval Process Detail Page.

Configure Initial Submission Actions:

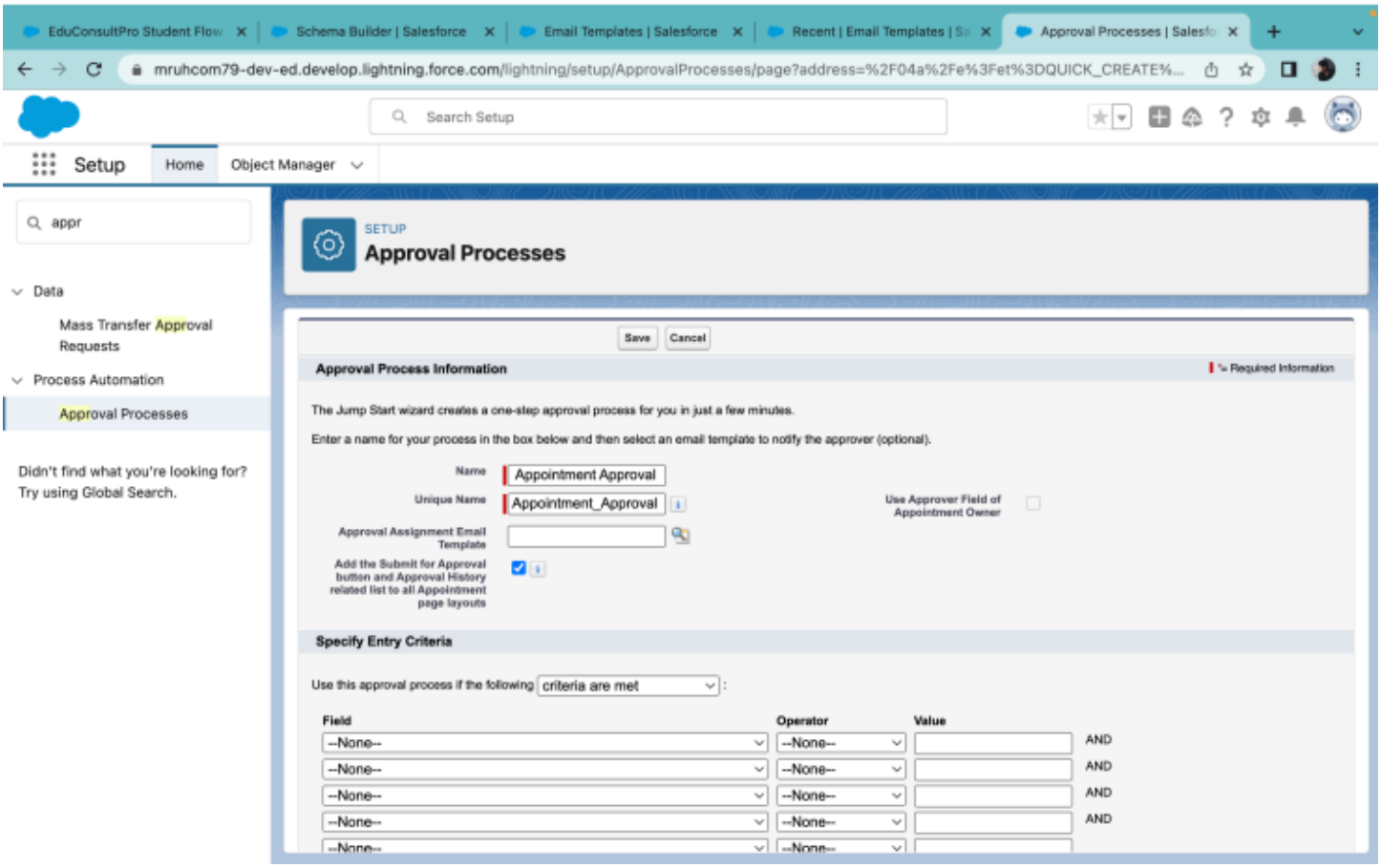
1. Under Initial Submission Actions, click Add New.

Add Field Update:

1. Name: Enter Submitted.
2. Field to Update: Choose Appointment: Status.
3. A Specific Value: Enter Pending.

4. Click Add New again.

Add Email Alert for Submission:



6. Create a Record Triggered Flow

6.1 Configure the Start Element

Navigate to Flows:

1. Go to Setup by clicking the gear icon in the upper right corner.
2. Use the Quick Find box to search for Flows.

Create a New Flow:

1. Click New Flow.
2. Select Record-Triggered Flow from the available flow options.
3. Click Create.

Configure the Start Element:

1. The Configure Start window will appear.
2. Object: Choose Appointment from the dropdown list.
3. Trigger the Flow When: Select A record is created to trigger the flow when a new appointment record is made.
4. Ensure that the flow configuration shows the selected object and trigger criteria accurately.

Click Done:

1. After configuring the Start element, click Done to move on to the next step in the Flow Builder.

6.2 Add an Action Element

Add Action Element to the Flow:

1. In the Flow Builder, drag an Action element from the left sidebar and position it after the Start element.

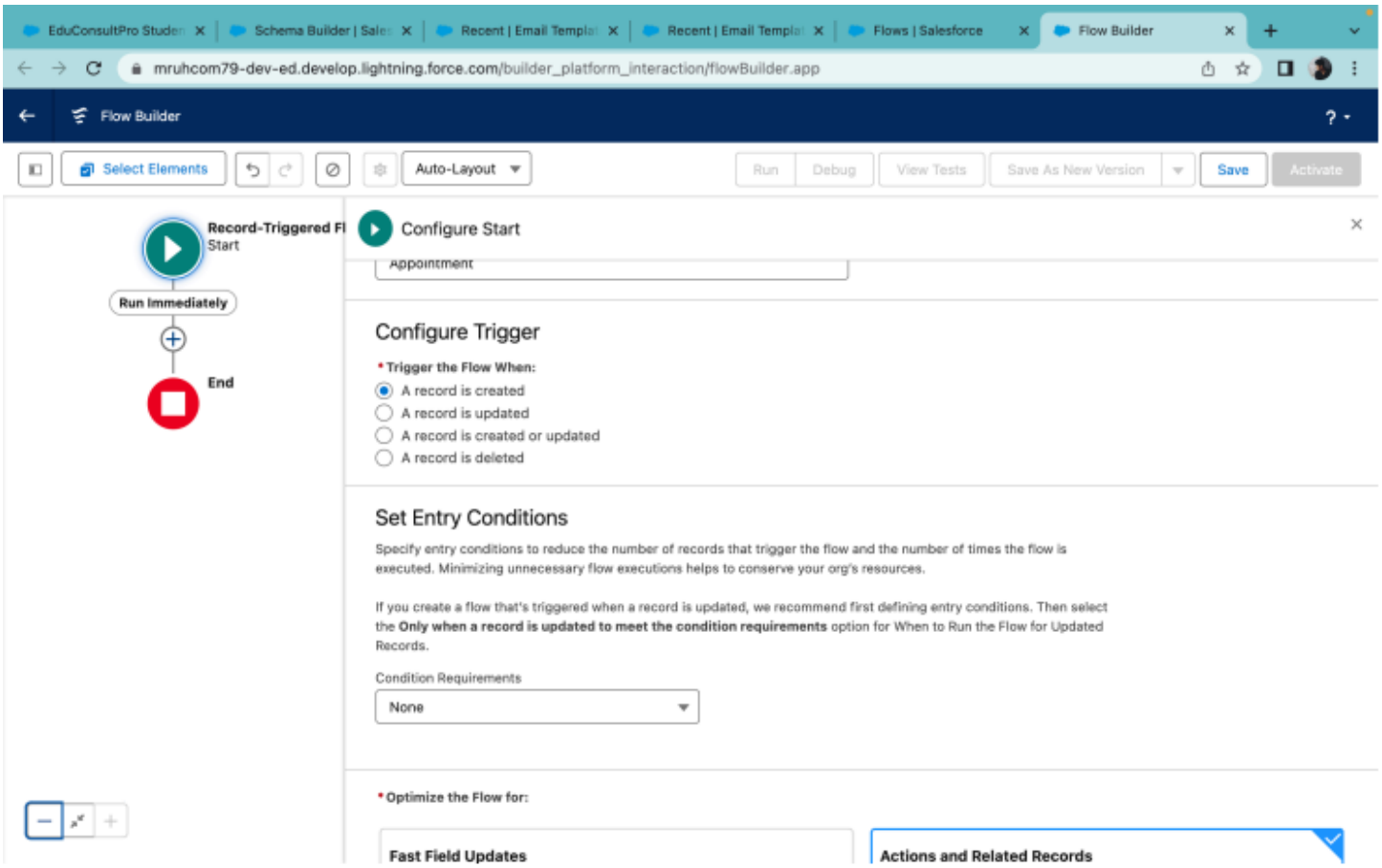
Configure the Action Element:

1. Click on the Action element to begin configuring it.
2. In the RecordId field, set the value to {!$Record.Id}. This configuration utilizes the ID of the record that triggered the flow.

Save and Activate the Flow:

1. Click Save to store your flow.
2. After saving, activate the flow to implement it.

These steps will guide you in configuring a record-triggered flow for the Appointment object with an action capable of performing tasks based on the newly created appointment.


Flow Builder
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Select Elements
Auto-Layout
Run
Debug
View Tests
Save As New Version
Save
Activate
Record-Triggered Fl
Start
Run Immediately
End
Configure Start
Appointment
Configure Trigger
*Trigger the Flow When:
A record is created
A record is updated
A record is created or updated
A record is deleted
Set Entry Conditions
Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.
If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the Only when a record is updated to meet the condition requirements option for When to Run the Flow for Updated Records.
Condition Requirements
None
*Optimize the Flow for:
Fast Field Updates
Actions and Related Records

7. Creating a Screen Flow for Existing Student to Book an Appointment

7.1 Add Screen Element

Navigate to Flow Builder:

1. Access Setup by clicking the gear icon in the upper right corner.
2. In the Quick Find box, type Flow Builder and select it.

Create a New Flow:

1. Click New Flow.
2. Choose Screen Flow from the available flow types.
3. Click Create to start constructing the flow.

Add a Screen Element:

1. In the Flow Builder, drag a Screen element from the left sidebar onto the canvas.

Configure the Screen Element:

1. Screen Label: Provide a label for the screen (e.g., "Student Registration Screen" or similar).
2. Add Text Components:
   - From the left sidebar, drag and drop two Text components onto the screen element.
   - Configure each Text component by labeling them appropriately (e.g., "First Name" and "Last Name").
   - Customize further as needed, such as marking them as required fields.

7.2 Add GET Record Element

1. Drag a Get Records Element: In the Flow Builder, drag the Get Records element from the left sidebar onto the canvas, placing it after the Screen element.
2. Configure the Get Record Element:
   - Label: Enter Get Rec.
   - Object: Select Student from the dropdown.
   - Condition Requirements: Choose All Conditions Are Met (AND).
3. Define the Conditions:
   - Field: Select Student Name.
   - Operator: Choose Equals.
   - Value: Set to {!Enter_Student_Name} (from the screen component).
   - Field: Select Email_c.
   - Operator: Choose Equals.

- Value: Set to {!Enter_Student_Email} (from the screen component).

4. Configure Record Output:
   - How Many Records to Store: Choose Only the first record if expecting a single match.
   - Store Record Data: Select to store the record's fields in a variable or use it directly in your flow.
5. Save the Get Record Element: Click Done to save the configuration.

7.3 Add Decision Element

1. Add Display Screen:
   - Drag a Screen element labeled Display Student Details and include the necessary fields.
2. Add a Decision Element:
   - Drag a Decision element from the left sidebar onto the canvas, placing it after the Display Student Details screen.
3. Configure the Decision Element:
   - Label: Enter Appointment or Case.
4. Define the Outcome for Appointment:
   - Outcome Label: Enter Appointment.
   - Resource: Select {!How_may_I_Help_you} (variable capturing the user's selection).
   - Operator: Choose Equals.
   - Value: Enter {!Book_an_Appointment} (value for booking an appointment).
5. Add Additional Outcomes for Case Options:
   - Click the + icon to add another outcome.
   - Outcome Label: Enter Case.
   - Resource: Select {!How_may_I_Help_you}.
   - Operator: Choose Equals.
   - Value: Enter {!Raise_a_Case} (value for raising a case).
6. Save the Decision Element: Click Done to save.

7.4 Add Appointment Booking Screen

1. Add a Screen Element:
   - Drag a Screen element from the left sidebar onto the canvas, placing it after the Decision element on the Appointment path.

2. Configure the Screen Element:
    - Label: Enter Appointment Booking Screen.
3. Create a New Resource:
    - Resource Type: Select Variable.
    - API Name: Enter AppointmentRecordRes.
    - Data Type: Select Record.
    - Object: Choose Appointment.
4. Add Fields from the Appointment Object:
    - Drag necessary fields from the Appointment object to the screen, including:
        - Appointment Date
        - Appointment Time
        - Purpose
        - Consultant
        - Student Name
5. Save the Screen Element: Click Done.

7.5 Add GET Consultant Record Element

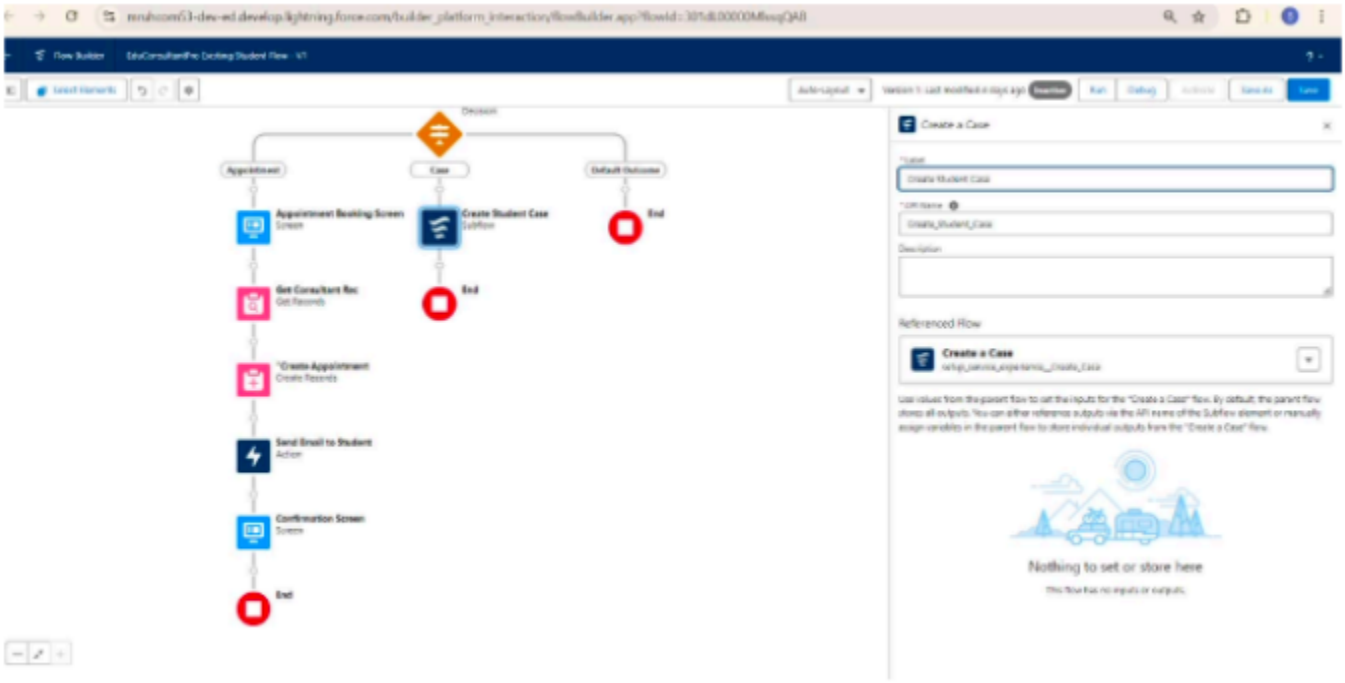
1. Add a Get Records Element:
    - Drag a Get Records element from the left sidebar onto the canvas, placing it after the Appointment Booking Screen on the Appointment path.
2. Configure the Get Records Element:
    - Label: Enter Get Consultant Rec.
    - Object: Select Consultant.
3. Define the Condition Requirements:
    - Condition Requirements: Choose All Conditions Are Met (AND).
    - Field: Select Name.
    - Operator: Choose Equals.
    - Value: Set to {!AppointmentRecordRes.Consultant_Name_c} (field capturing the consultant's name from the appointment record).
4. Configure Record Output:
    - How Many Records to Store: Choose Only the first record if expecting a single match.
    - Store Record Data: Select an appropriate option based on your flow requirements.
5. Save the Get Records Element: Click Done.

7.6 Create Appointment Record

1. Add a Create Records Element:
    - Drag a Create Records element from the left sidebar onto the canvas, placing it after the Get Consultant Rec element.
2. Configure the Create Records Element:
    - Label: Enter Create Appointment.
    - Configure the fields and values based on the details captured in the previous steps.

7.8 Add SubFlow Element

1. Drag a SubFlow Element:
    - Place it after the Decision element on the Case path.
2. Configure the SubFlow Element:
    - Label: Enter Create Student Case.
    - Flow: Search for and select the subflow named Create a Case.
3. Save the Flow:
    - Click Save.
    - Flow Label: Enter EduConsultantPro Existing Student Flow.
    - API Name: This will auto-populate based on the flow label.
4. Activate the Flow: Click Activate to make the flow active.



8. Creating a Screen Flow to Combine All Flows in One Place

8.1 Add Welcome Screen

1. Add a Screen Element:
   - Drag a Screen element from the left sidebar onto the canvas.
   - Label: Enter Welcome Screen.
2. Add Display Text Component:
   - From the left panel, drag the Display Text component to the main panel.
   - Label: Enter SuccessMessage.
3. Add Welcome Message:
   - In the Display Text component, paste the following text:
   - Welcome to EduConsultantPro!

     Your premier destination for education and immigration solutions!

     We guide you with expertise and personalized support, covering all aspects of your educational and immigration journeys.

     Our seasoned consultants help you achieve your goals efficiently, from selecting the right institution to navigating visa procedures.

     We believe in fostering inclusive communities and unlocking your potential.

Welcome to EduConsultantPro - where your aspirations meet our expertise. Let's embark on this journey together!

4. Save the Display Text Component: Click Done to save the Display Text component.
5. Save the Screen Element: Click Done to save the Welcome Screen.

8.2 Add Existing or New Student Confirmation Screen

1. Add a Screen Element:
    - Drag another Screen element from the left sidebar onto the canvas and position it after the Welcome Screen element.
    - Label: Enter Existing or New Student Confirmation Screen.
2. Add Radio Button Component:
    - From the left panel, drag the Radio Buttons component to the main panel.
    - Label: Enter Are you an Existing Student?
3. Add Choice Options:
    - Click on Add Choice.
        - Label: Enter Yes.
        - Click Create Yes Choice.
    - Click Add Choice again.
        - Label: Enter No.
        - Click Create No Choice.
4. Save the Radio Button Component: Click Done to save the Radio Buttons component.
5. Save the Screen Element: Click Done to save the Existing or New Student Confirmation Screen.

8.3 Add Decision Element

1. Add a Decision Element:
    - Drag a Decision element from the left sidebar onto the canvas and position it after the Existing or New Student Confirmation Screen.
    - Label: Enter Decision 1.
2. Configure Outcome for Existing Student:
    - Outcome Label: Enter If Existing Student.
    - Condition:
        - Resource: Select {!Are_you_a_Existing_Student} (from the radio button component).
        - Operator: Equals.

        - Value: Yes.
3. Configure Outcome for New Student:
    - Outcome Label: Enter If New Student.
    - Condition:
        - Resource: Select {!Are_you_a_Existing_Student}.
        - Operator: Equals.
        - Value: No.
4. Save the Decision Element: Click Done to save the configuration for Decision 1.

8.4 Add Subflow Element for Existing Student

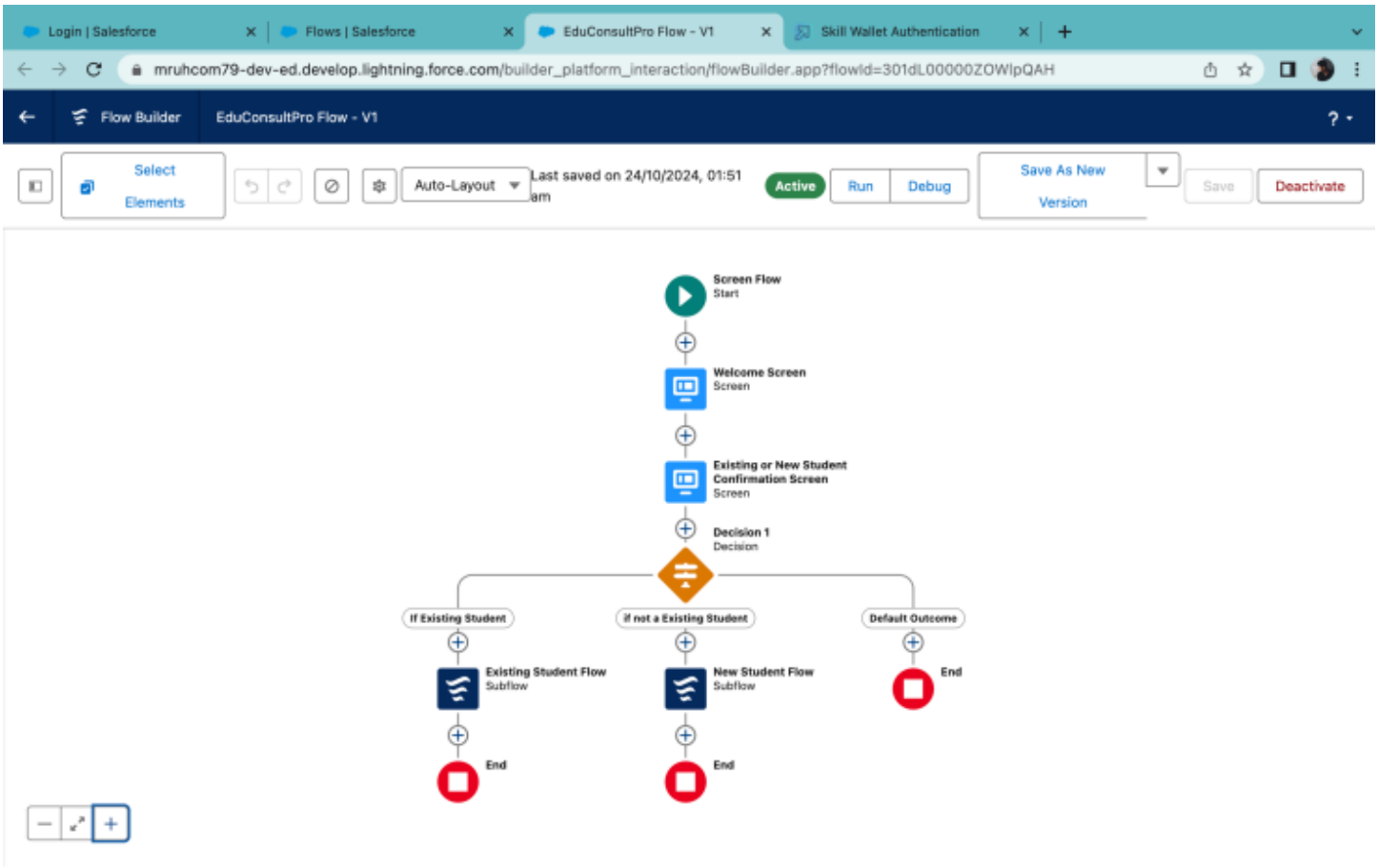
1. Add a Subflow Element:
    - Drag a Subflow element from the left sidebar onto the canvas, placing it on the If Existing Student path.
    - Label: Enter Existing Student Flow.
2. Configure the Subflow:
    - Subflow Selection: Search for and select EduConsultantPro Existing Student Flow.
3. Save the Subflow Element: Click Done to save the Existing Student Flow subflow element.

8.5 Add Subflow Element for New Student

1. Add a Subflow Element:
    - Drag another Subflow element from the left sidebar onto the canvas, positioning it on the If New Student path.
    - Label: Enter New Student Flow.
2. Configure the Subflow:
    - Subflow Selection: Search for and select EduConsultantPro Student Flow.
3. Save the Subflow Element: Click Done to save the New Student Flow subflow element.

Final Save and Activation

1. Save the Entire Flow:
    - Flow Label: Enter EduConsultPro Flow.
2. Activate the Flow: After saving, click Activate to make the flow live.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Flows | Salesforce
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Flow Builder
EduConsultPro Flow - V1
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Last saved on 24/10/2024, 01:51 am
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Run
Debug
Save As New Version
Save
Deactivate
Screen Flow
Start
Welcome Screen
Screen
Existing or New Student Confirmation Screen
Screen
Decision 1
Decision
If Existing Student
If not a Existing Student
Default Outcome
Existing Student Flow
Subflow
New Student Flow
Subflow
End
End
End

9. Creating a Lightning App Page

1. Create a New Lightning Home Page
    1. Access Setup: Click on the gear icon located in the top right corner.
    2. Open App Builder: Type App Builder in the Quick Find box and select Lightning App Builder.
    3. Create New Page: Click on New, select Home Page as the type of page, and then click Next.
    4. Page Naming: Enter EduConsultPro Home Page as the name.
2. Configure the Home Page
    1. Add Components:
        - Drag and drop essential components (e.g., Today's Tasks, Recent Items, Reports, List Views for monitoring students or appointments) into your preferred layout.
        - Place the EduConsultPro information or welcome message prominently at the top section of the page for visibility.
        - Arrange consultant-related components (such as Today's Events or Top Consultants) in the sidebar.
3. Save and Activate the Page
    1. Save Changes: Click Save after arranging all the components on the page.
    2. Activate the Page:
        - Click Activate in the upper right corner of the page editor.
        - Choose App and Profile Assignment.
4. Assign to Apps and Profiles
    1. Select Apps: Choose the Sales app, then click Next.
    2. Choose Profiles:
        - Scroll down to select the System Administrator profile.
        - Click Next to confirm your selection.
    3. Review and Save:
        - Review the assignments and click Save to finalize the process.

ServiceHub Project Conclusion

The ServiceHub project has transformed ServiceHub Institute's operations by implementing

Salesforce to streamline admissions, consulting services, and case management for immigration support. By developing customized objects, creating efficient flows, and automating critical processes, we have significantly improved both data management and user experience.
Key achievements include:

1. Integrated Data Management: Efficient creation and seamless linkage of essential objects like Courses, Consultants, and Students.
2. Optimized Processes: Automated flows for admissions and appointments that reduce manual efforts and errors.
3. Enhanced Communication: Personalized screens and email templates that improve engagement and streamline communication.
4. Effective Approvals: Well-defined approval processes ensure compliance and enhance management.
5. Streamlined Access: Integration into the Lightning App Builder for a cohesive, user-friendly experience.

These advancements position ServiceHub Institute to operate with enhanced efficiency and scalability, enabling more organized and responsive service for students, consultants, and administrators alike. With Salesforce at its core, ServiceHub is now well-equipped to support future growth and improve service delivery.