

# A CRM Application to Manage the Services offered by an Institution

## Requirements

### 1. Admission Application Management:

Prospective students should have access to the admission application form through the institute's website or portal. The admission application form should collect comprehensive information including personal details, academic history, and qualification. Submitted admission applications should be captured and stored in the Salesforce CRM system. Students should receive automated email notifications after successful submission of application. Admissions staff should be able to generate reports and dashboards to analyze application metrics, acceptance rates, and enrollment trends.

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### 2. Approval Process Requirements:

Implement an Approval process in Salesforce to review and approve Consulting Request. Set up email alerts to notify relevant students when he/she is approved or rejected. Ensure that request gets automatically submitted when it is created.

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### 3. Consulting Services Management:

Prospective students should be able to request consulting services through the institute's website or portal. The consulting request form should capture student details, consulting preferences, and areas of expertise required. Submitted consulting requests should be recorded in the Salesforce CRM system. Consultants and advisors should receive automated email notifications for new consulting requests. Consultants should be able to view, accept, and manage consulting requests within the Salesforce CRM interface. Consulting appointment scheduling should be facilitated within Salesforce, including date, time, and purpose of the appointment. Appointment status (e.g., scheduled, completed, canceled) should be tracked and updated in Salesforce.

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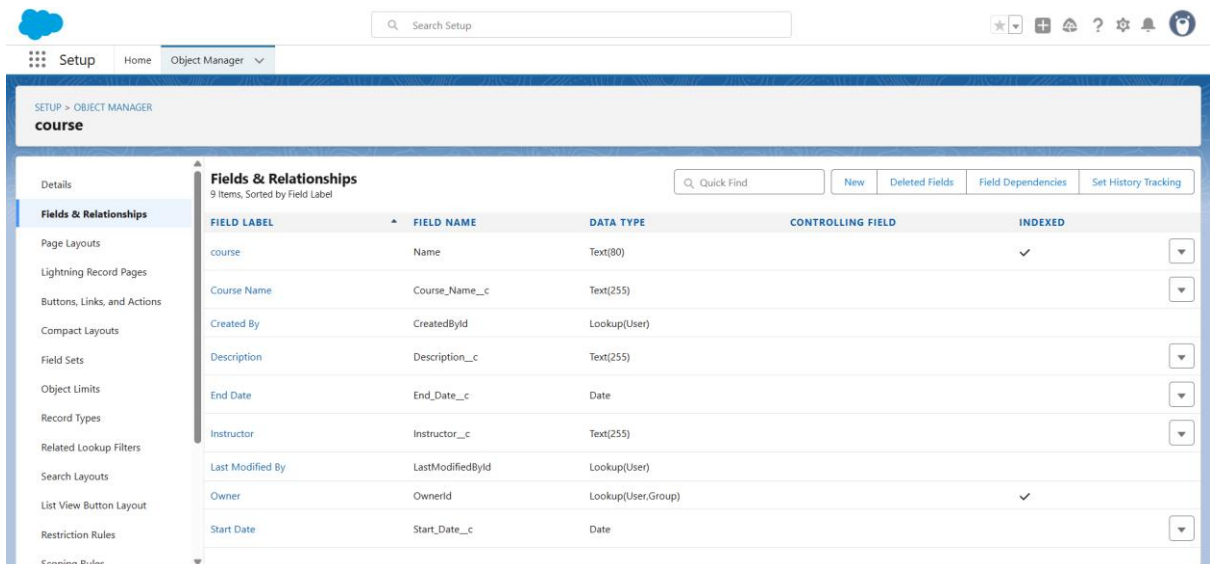
### 4. Immigration Case Management:

Students should be able to initiate immigration cases through the phone, email or web. The immigration case submission form should capture case details, and relevant information. Submitted immigration cases should be recorded and stored in the Salesforce CRM system. Immigration agents and case managers should receive

automated email notifications for new Immigration cases. Immigration agents should be able to view, process, and track immigration cases within the Salesforce CRM interface. Case status (e.g., open, in progress, closed) should be tracked and updated in Salesforce. Document management and collaboration tools should be integrated to facilitate case processing and communication.

## Create Course Object

1. Go to your object manager and click on create object from spreadsheet.
2. Click on the link to get the spreadsheet, Course.
3. After downloading, upload the file, map the fields and upload to create an object.



FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
course	Name	Text(80)		✓
Course Name	Course_Name__c	Text(255)		
Created By	CreatedById	Lookup(User)		
Description	Description__c	Text(255)		
End Date	End_Date__c	Date		
Instructor	Instructor__c	Text(255)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User, Group)		✓
Start Date	Start_Date__c	Date		

## Create Remaining Objects

1. Follow the steps which we have followed for course object creation.
2. Use the following sheets for remaining objects.
  - a. Consultant
  - b. Student
  - c. Appointment

Create a custom object from a spreadsheet

Define object and fields

Choose the data source, map fields and their types, and import field data.

Worksheet Details

Field Label Source

☐ Enter manually

☒ Detect from row

Field Labels Row

1

Import 5 rows of Data?

☐ No, skip import

☒ Yes, import data

Record Name Field

Let Salesforce Create a Default F

Fields 6 of 6 to import

☐ Hide mapped fields

IMPORT FILE FIELD NAME	SALESFORCE FIELD NAME	SALESFORCE FIELD TYPE	ADD TO LAYOUTS	FIELD PREVIEW
✓ Student Name	Student Name	Text	✓	Rahul Mehta
✓ Email	Email	Email	✓	rahul@gmail.com
✓ Phone Number	Phone Number	Integer	✓	9876543210
✓ Enrollment Date	Enrollment Date	Date	✓	3/1/26
✓ Course Enrolled	Course Enrolled	Text	✓	IELTS
✓ Consultant	Consultant	Text	✓	Sandeep

Back

Next

Setup

Home

Object Manager

Object Manager

2 Items, Sorted by Label

stu

stud

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Credential Stuffing Event Store	CredentialStuffingEventStore	Standard Object			
Student	Student_c	Custom Object		22/09/2025	✓

Consultant:

Setup

Home

Object Manager

Consultant

11 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address_c	Text(255)		
Consultant	Consultant_c	Text(255)		
Consultant	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Email	Email_c	Email		
Expertise	Expertise_c	Text(255)		
First Name	First_Name_c	Text(255)		
Last Modified By	LastModifiedById	Lookup(User)		
Last Name	Last_Name_c	Text(255)		

Appointment:

SETUP > OBJECT MANAGER

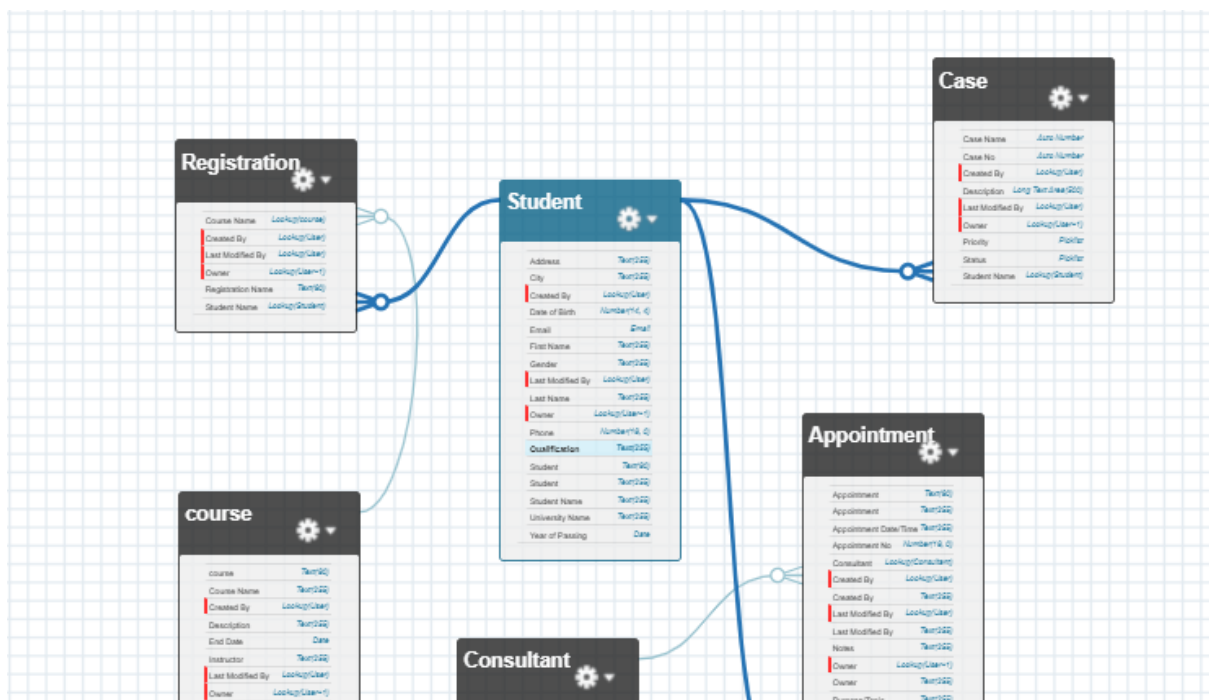
## Appointment

**Details**  
Fields & Relationships  
Page Layouts  
Lightning Record Pages  
Buttons, Links, and Actions  
Compact Layouts  
Field Sets  
Object Limits  
Record Types  
Related Lookup Filters  
Search Layouts  
List View Button Layout

**Details**  
Description  
API Name  
Appointment\_c  
Custom  
✓  
Singular Label  
Appointment  
Plural Label  
Appointments  
Enable Reports  
✓  
Track Activities  
✓  
Track Field History  
Deployment Status  
Deployed  
Help Settings  
Standard salesforce.com Help Window

## Create Relationship Among the Objects

1. Create lookup between appointment and student, appointment and consultant.
2. Create an object to store the information student and course details with the name Registration.
3. Also create a lookup between student and case to store the student queries for immigration or visa application.
4. The data model should be similar to the below Data Model with fields & relationships:



## Configure The Case Object

1. Go to object manager, edit case object.
2. Select the "Type" field and add the values in it.
  - Immigration
  - Visa Application
3. Now Select the "Status" field and add the values in it.
  - Open
  - In-progress

SETUP > OBJECT MANAGER

### Case

Details

**Fields & Relationships**

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Quick Find

New Deleted Fields Field Depe

10 Items, Sorted by Field Label

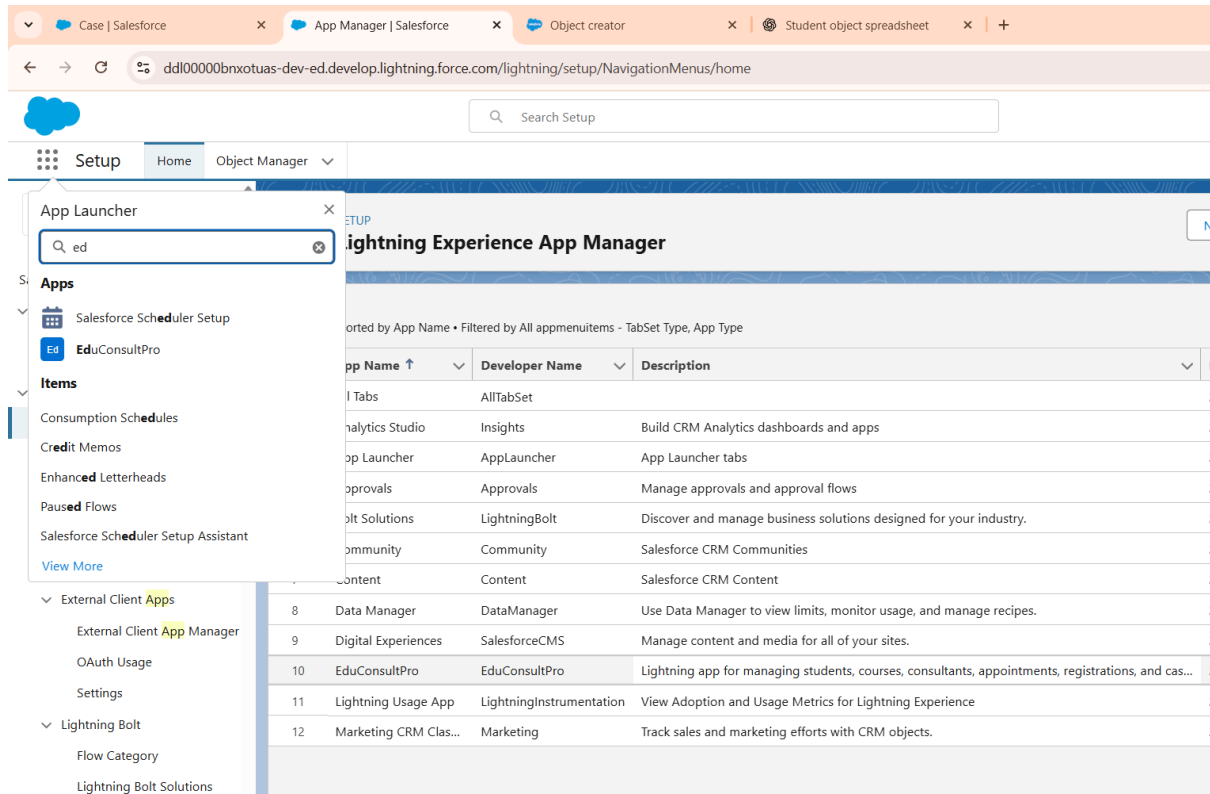
Created By	CreatedById	Lookup(User)
Description	Description__c	Long Text Area(500)
Last Modified By	LastModifiedById	Lookup(User)
Owner	OwnerId	Lookup(User,Group)
Priority	Priority__c	Picklist
Status	StatusStatus__c	Picklist
Student Name	Student__c	Lookup(Student)
Type	Type__c	Picklist

>>

## Create A Lightning App

1. Go to Setup, search for the App Manager in quick find.
2. Click on New Lightning App.
3. Give app name as "EduConsultPro", click Next, Next, Next.

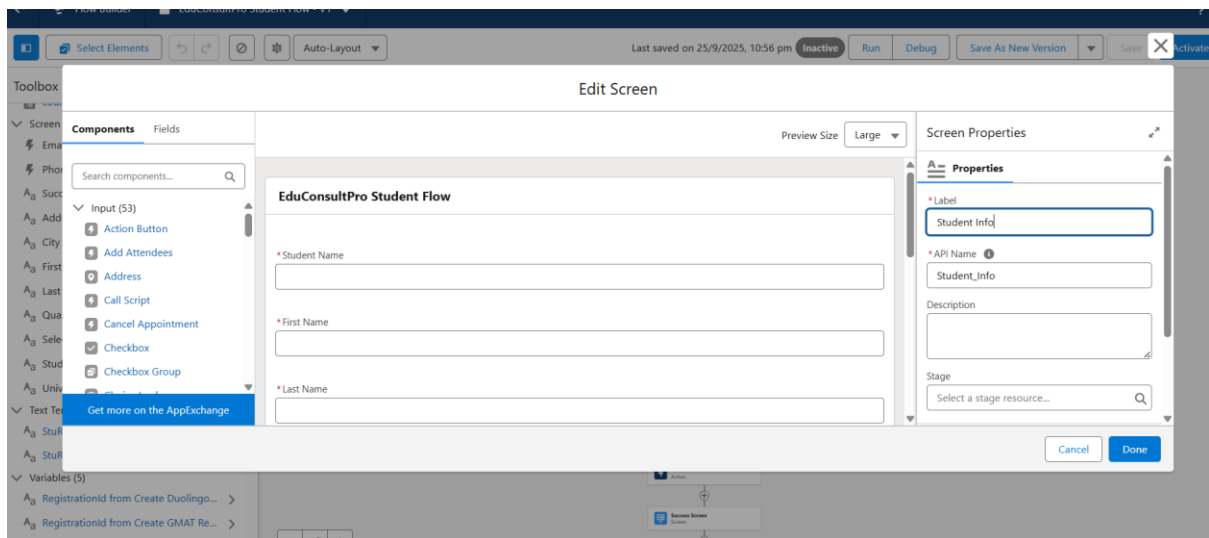
4. Add Home, Students, Courses, Consultants, Appointments, Registrations, and Cases from the Available Items to Selected Items.
5. Add "System Administrator" profile from Available Profiles to Selected Profiles, click Save & Finish.



## Create A Screen Flow for Student Admission Application Process

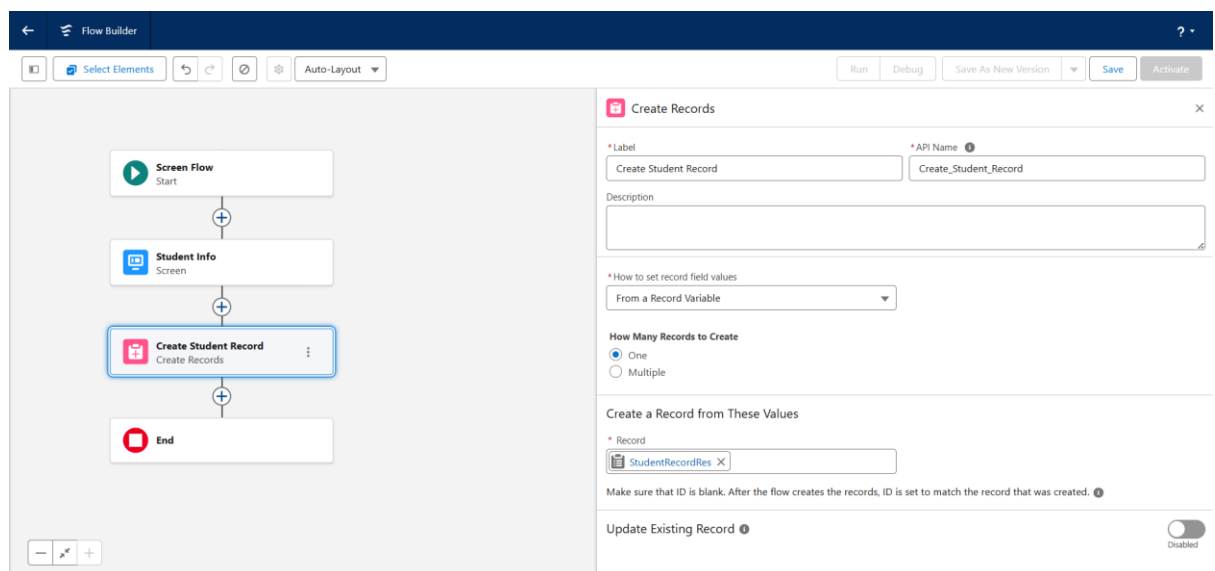
### Add Screen Element (Flow Builder)

1. From Setup, enter Flow Builder in the Quick Find box, then select New Flow -> Screen Flow.
2. Add a Screen element.
3. In the Screen Properties pane, for the Label, enter Student Info.
4. Click on Fields, click on the record variable input, and create a new Resource (e.g., StudentRecordRes) to display all the fields from the Student object that are needed to collect student information. Drag the required fields to the screen.



## Create Student Record Using Create Element

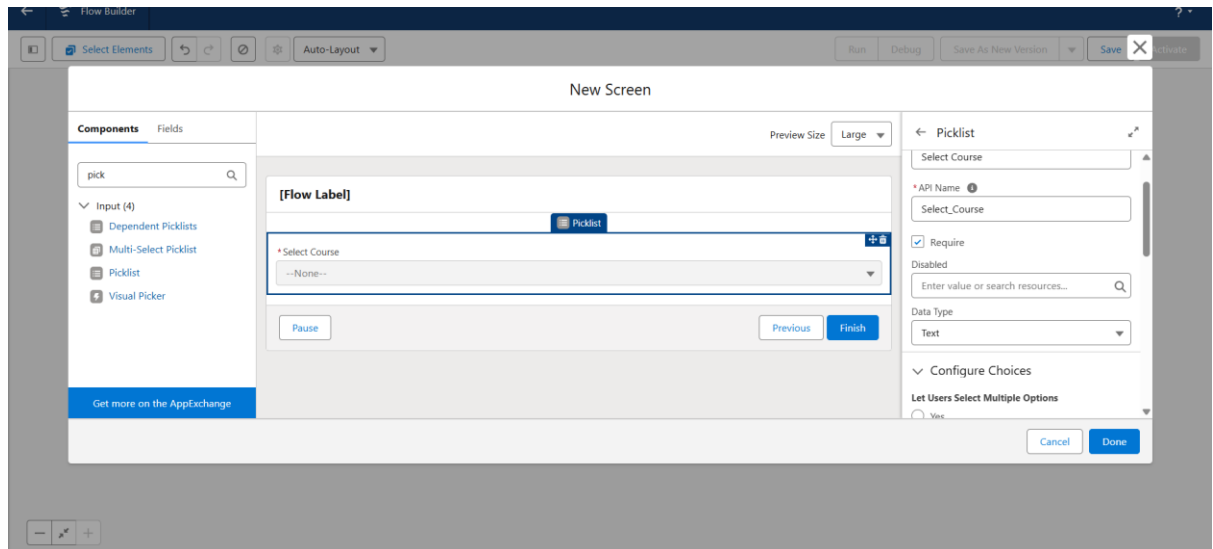
1. Add a Create element after Student Info Screen Element, Label it as "Create Student Record."
2. Select "one" under How many records to Create, and select "use all values from a record" under How to Set the record fields.
3. Select the record variable resource (StudentRecordRes) which we have created in the Student Info screen element, under Create a record from these values.



## Add Screen Element

1. Add a Screen Element after Create Student Record Element and label it as Course Screen.

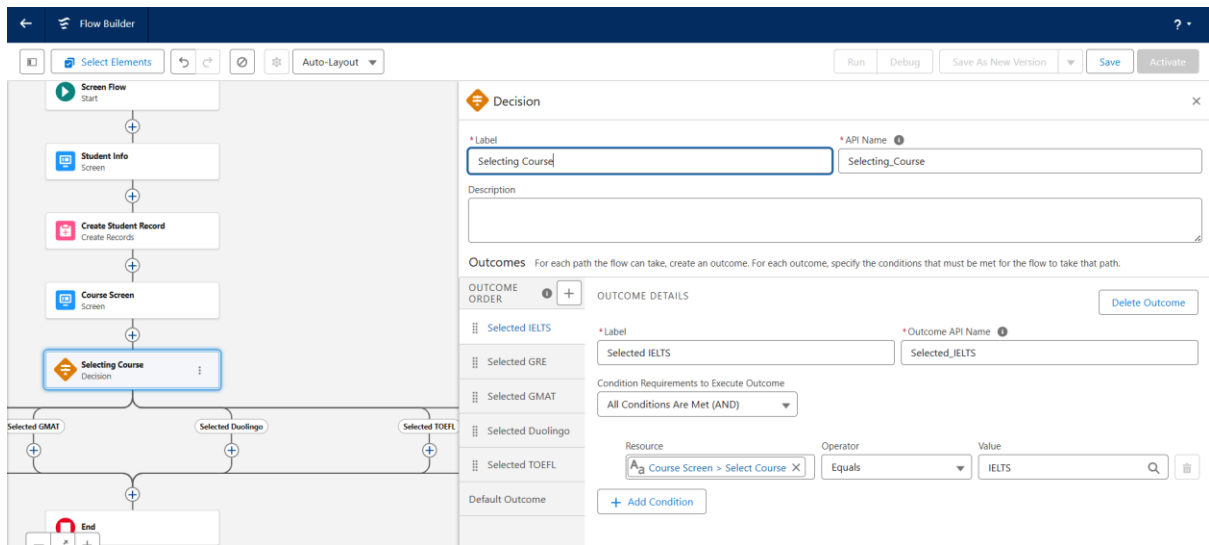
2. Add a picklist component from the left side panel label it as "Select Course", under choices type "IELTS" and enter. This creates a variable with the name IELTS.
3. Repeat the same for GRE, GMAT, Duolingo, TOEFL.



## Add Decision Element

1. Add a Decision Element after Select Course Screen Element, label it as Selecting Course.
2. Under outcome label it as "Selected IELTS" and write the condition such as below: Resource : Select\_Course (Screen Component from Select Course Screen Element) Operator : Equals Value : IELTS (Choice Variable from Select Course Screen Element)
3. Click on the "+" icon and Repeat step 2 for other options mentioned as below:
  - a. GRE
  - b. GMAT
  - c. Duolingo
  - d. TOEFL
4. Click Done.





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## Add GET Record Element

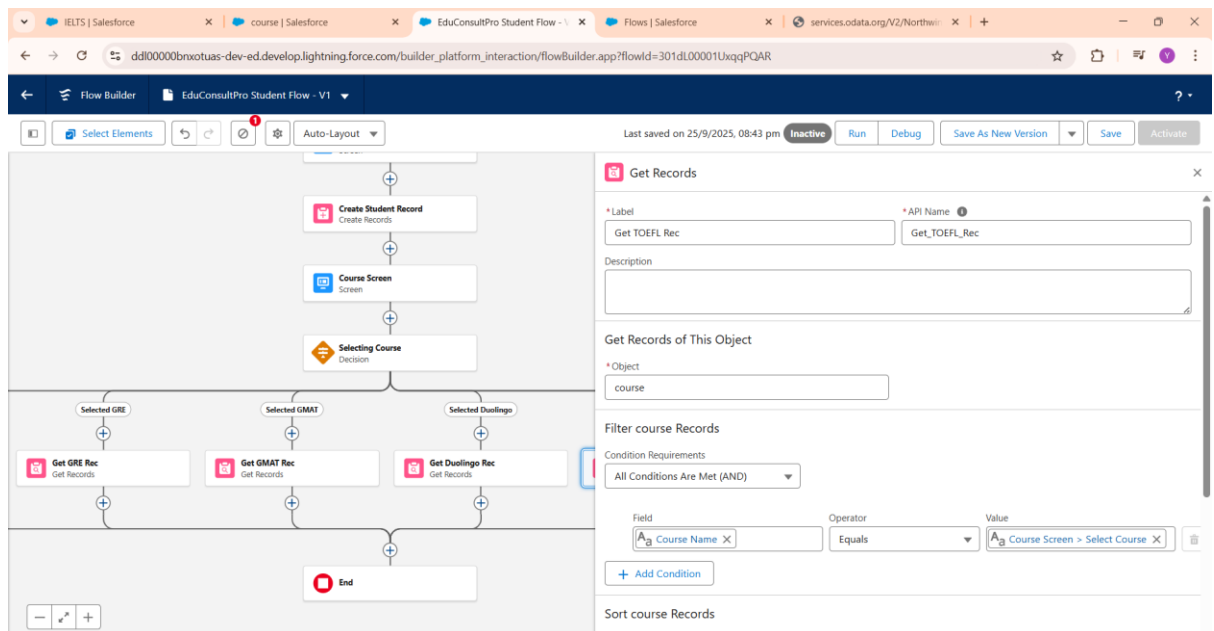
1. Add a GET Record Element after Decision Element, under the IELTS path and label it as "Get IELTS Rec".
2. Select Object :

Course Condition Requirement : All Conditions are Met(AND)

a. Field : Course Name

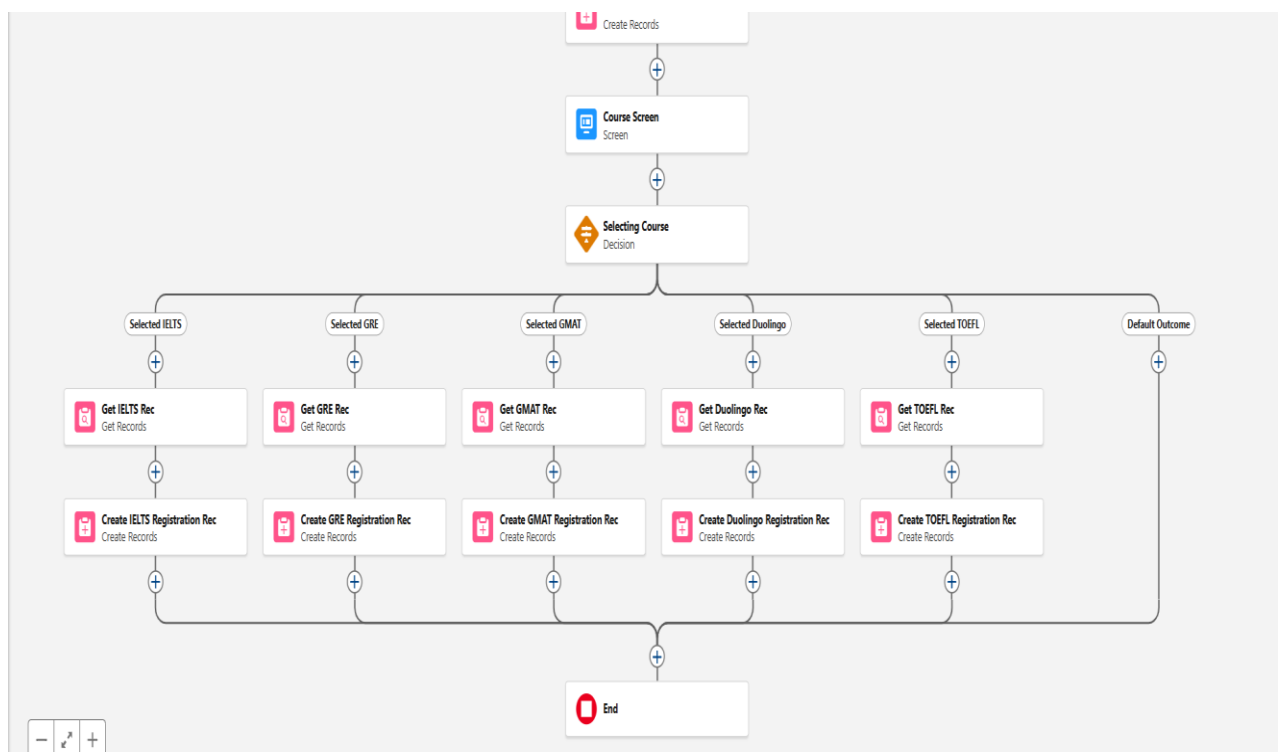
Operator : Equals

Value : {!Select\_Course}



## Create Registration Record Using Create Records Element

1. Add a Create element after the Get IELTS Rec element and label it as "Create IELTS Registration Rec".
2. Select "one" under How many records to Create, and select "Use separate resources, and literal values" under How to Set the record fields.
3. Select Object : Registration
  - a. Field : Course\_Name\_\_c
  - b. Value : {!Get\_IELTS\_Rec.Id}
  - c. Field : Student\_Name\_\_c
  - d. Value : {!StudentRecordRes.Id}



## CREATE EMAIL TEXT TEMPLATE VARIABLES FOR EMAIL BODY AND SUBJECT:

### Subject

1. Click on the toggle toolbox on the left corner, click "New Resource", then select "Text Template" as Resource Type.
2. Give the API name as StuRegistrationEmailTextTempBody, select "view as plain text" and paste the below text in 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.

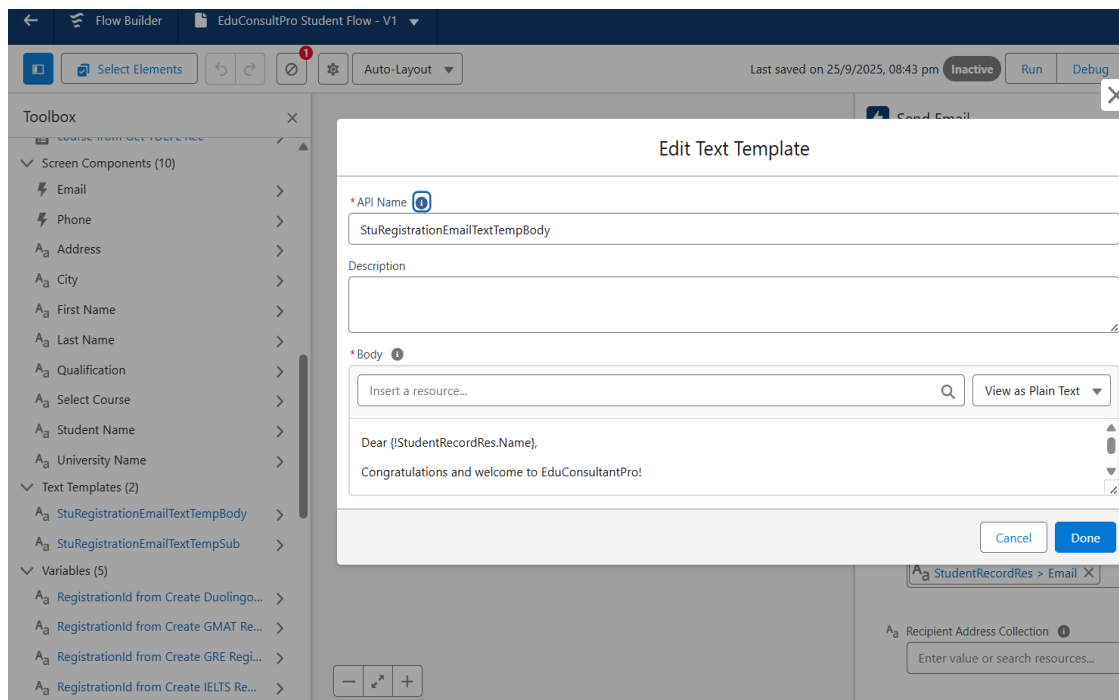
**Engage with the Community :** Join our vibrant community of students, professionals, and experts who share your passion for education and global opportunities. Connect with like-minded individuals, participate in discussions, and expand your network.

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.

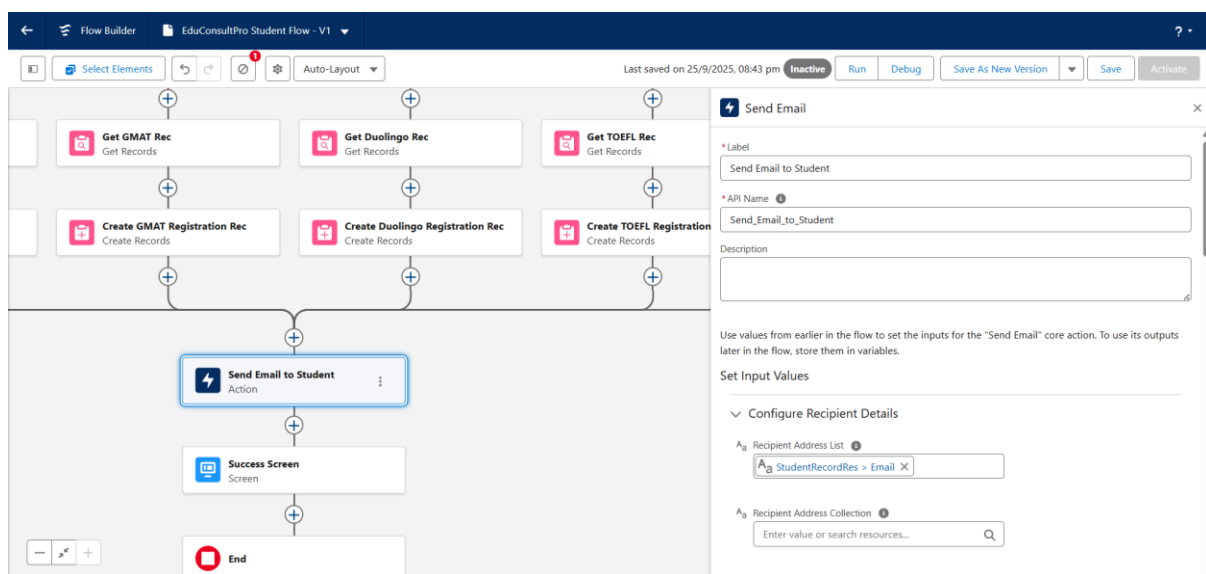
Thank you

3. Click Done.
4. 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.



## Add An Action Element

1. Add an Action Element after all the Decision paths, label it as "Send Email to Student".
2. Under "Set input values for selected action", include body, Recipient Address List and Subject.
3. For input Body : `{!StuRegistrationEmailTextTempBody}` Recipient Address List : `{!StudentRecordRes.Email__c}` Subject : `{!StuRegistrationEmailTextTempSub}`



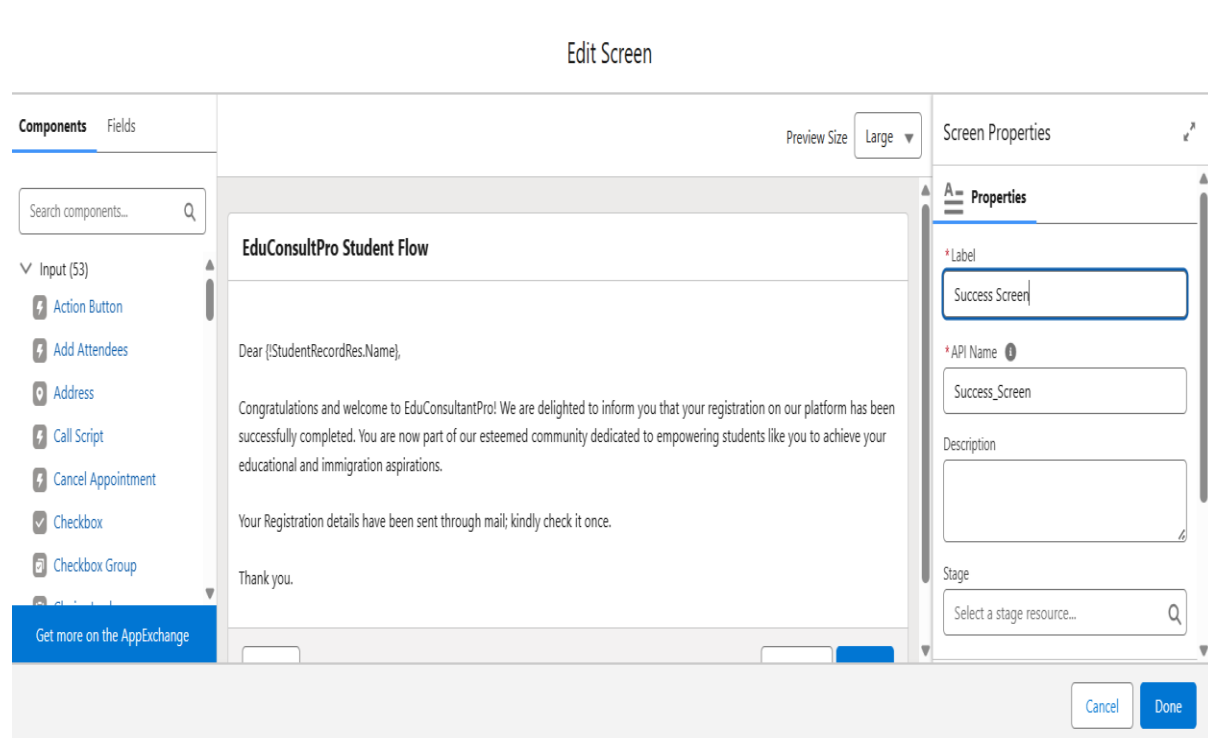
## Add Screen Element

1. Add a Screen Element after the Send Email to Student Action Element, label it as Success Screen.
2. From the left side panel search for the Display text component and drag it to the main panel, label it as "SuccessMessage".
3. Paste the below in 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."

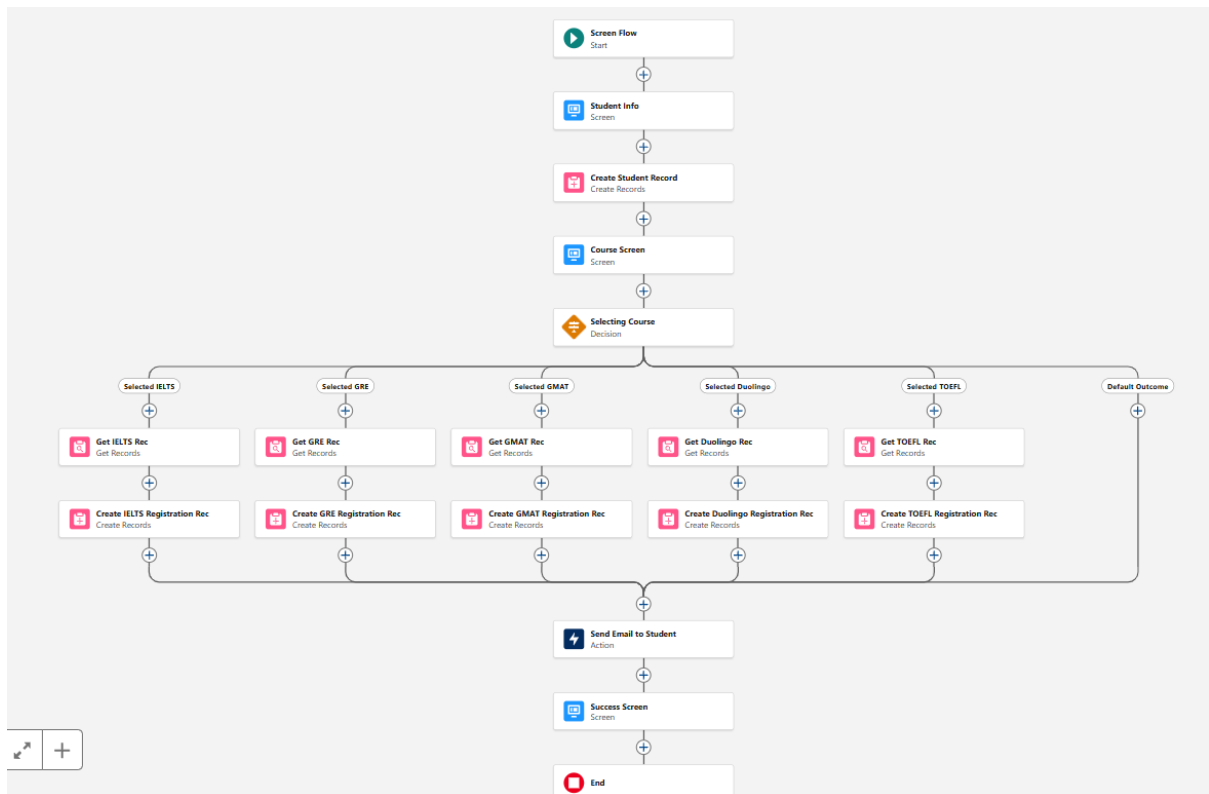
Congratulations and welcome to EduConsultantPro! We are delighted to inform you that your registration on our platform has been successfully completed. You are now part of our esteemed community dedicated to empowering students like you to achieve their educational and immigration aspirations.

Your Registration details have been sent through mail kindly check it once.

Thank you."



4. Click Done.
5. Save the flow and name it as "EduConsultPro Student Flow". Your flow will look as shown below:



## Create Users

Create a user with a standard platform user profile

User

1. Go to Setup --> Administration --> Users --> New User
2. LastName : Consultant
3. License : Salesforce Platform
4. Profile : Standard Platform User
5. Fill all the mandatory fields & Save.

The screenshot shows the 'Users' page in Salesforce Setup. The user 'Consultant' is selected. The page includes a navigation bar with links like 'Permission Set Assignments', 'Activation Required', etc. Below the navigation bar, there are buttons for 'Edit', 'Sharing', 'Reset Password', 'Freeze', and 'View Summary'. The user details are displayed in a table format:

Name	Consultant	Role	Salesforce Platform
Alias	ccons	User License	Standard Platform User
Email	jagarapuvalasri@gmail.com [Verify]	Profile	Standard Platform User
Username	jagarapuconsultant@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	consultant	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	<input type="checkbox"/>
Delegated Approver		Data.com User Type	<input type="checkbox"/>
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/>
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/>

## Configure The User Settings

1. Go to Setup --> Administration --> Users --> click Edit next to your name
2. Scroll down to bottom, under Approver Settings, Select "Consultant" the Manager Field.
3. Click Save.

The screenshot shows the 'Approver Settings' section. It contains three fields:

- Delegated Approver:** A text input field with a search icon.
- Manager:** A dropdown menu with 'Consultant' selected and a search icon.
- Receive Approval Request Emails:** A dropdown menu with 'Only if I am an approver' selected.

## CREATE AN APPROVAL PROCESS FOR PROPERTY OBJECT

### Create An Email Template

1. From Setup, enter Templates in the Quick Find box, and then select Lightning Email Template toggle on.
2. go to app launcher, search for "Email Templates", Create a new folder with the desired name.

3. Then create a new email template, select the folder which we have created in the previous steps, enter the below text in the HTML Value and Save it as "Submission Template."

Email Template Text:

Dear {{{Appointment\_\_c.Student\_Name\_\_c}}},

I hope this email finds you well. I am writing to confirm the details of our upcoming appointment scheduled for {{{Appointment\_\_c.Appointment\_DateTime\_\_c}}} regarding {{{Appointment\_\_c.PurposeTopic\_\_c}}}.

Appointment Details:

Appointment No: {{{Appointment\_\_c.Name}}}

Student Name: {{{Appointment\_\_c.Student\_Name\_\_c}}}

Consultant Name: {{{Appointment\_\_c.Consultant\_\_c}}}

Date & Time: {{{Appointment\_\_c.Appointment\_DateTime\_\_c}}}

Purpose: {{{Appointment\_\_c.PurposeTopic\_\_c}}}

I want to assure you that I am looking forward to our meeting and am fully prepared to address any questions or concerns you may have regarding {{{Appointment\_\_c.PurposeTopic\_\_c}}}. Your success and satisfaction are my top priorities, and I am committed to providing you with the guidance and support you need.

If you have any specific topics or questions you would like to discuss during our appointment, please feel free to share them with me in advance. This will help ensure that our time together is as productive and beneficial as possible.

If for any reason you need to reschedule or cancel our appointment, please notify me at your earliest convenience so that we can make alternative arrangements.

Once again, thank you for choosing to work with me on this matter. I am confident that our collaboration will lead to positive outcomes and progress toward your goals.



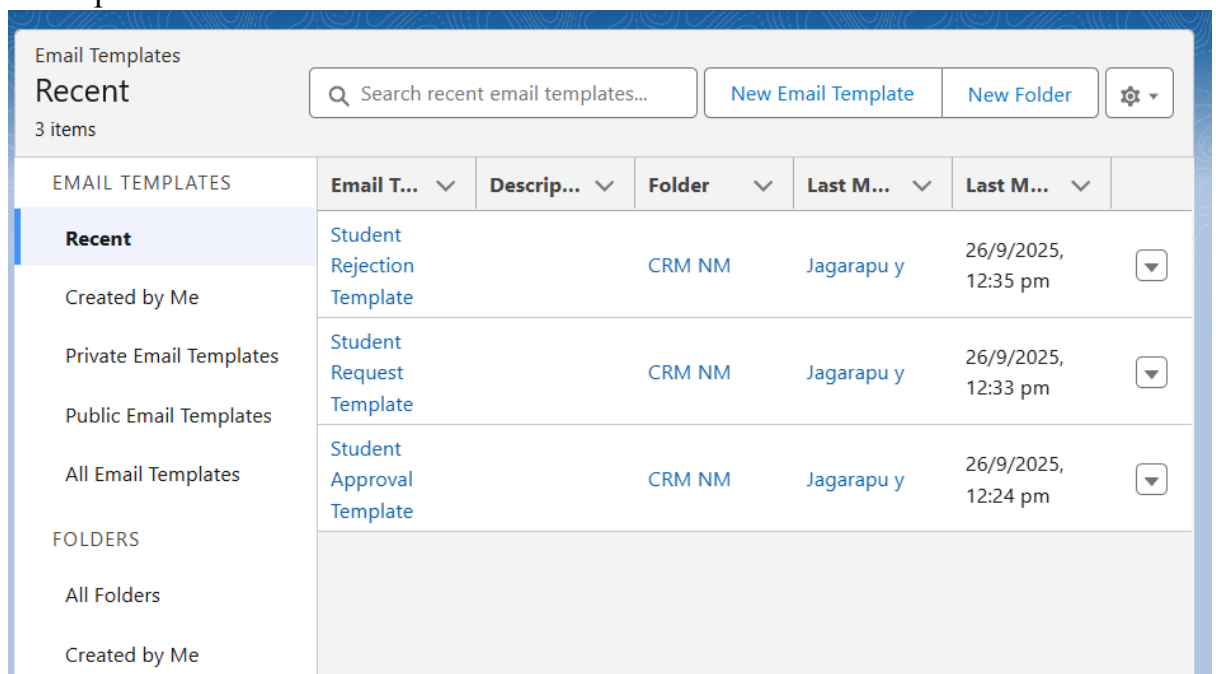
If you have any questions or require further information before our scheduled appointment, please don't hesitate to reach out to me.

Looking forward to our meeting.

Best regards,

EduConsultantPro

4. Create two more email templates for approval and rejection of request similar to the previous one.



The screenshot displays the 'Email Templates' section of a software interface. It features a search bar, buttons for 'New Email Template' and 'New Folder', and a settings icon. A table lists three recent templates, each with columns for Email Title, Description, Folder, and Last Modified. The left sidebar shows navigation options for templates and folders.

EMAIL TEMPLATES	Email T...	Descrip...	Folder	Last M...	Last M...	
<b>Recent</b>	Student Rejection Template		CRM NM	Jagarapu y	26/9/2025, 12:35 pm	▼
Created by Me	Student Request Template		CRM NM	Jagarapu y	26/9/2025, 12:33 pm	▼
Private Email Templates	Student Approval Template		CRM NM	Jagarapu y	26/9/2025, 12:24 pm	▼
Public Email Templates						
All Email Templates						
FOLDERS						
All Folders						
Created by Me						

## Create An Approval Process

1. From Setup, enter Approval in the Quick Find box, and then select Approval Processes.
2. In Manage Approval Processes For, select Appointment.
3. Click Create New Approval Process --> Use Jump Start Wizard.
4. Configure the approval process.
5. Process Name - Appointment Approval, Under Select Approver, Select Manager for the option: "Automatically assign an approver using a standard or custom hierarchy field." [Image showing the "Select Approver" section with the option "Automatically assign an approver using a standard or custom hierarchy field" selected, and the dropdown box set to "Manager."]

6. Click next and "Next Automated Approver Determined By" --> Select Manager.
7. From Record Editability Properties --> Click on Administrators OR the currently assigned approver can edit records during the approval process.
8. Save the approval process.
9. Click View Approval Process Detail Page.
10. Under Initial Submission Actions, click Add New --> Field Update, and configure it with these [steps/details... (The image cuts off here)].

Field	Value
-------	-------

Name	Submitted
------	-----------

Field to Update	Appointment: Status
-----------------	---------------------

A Specific value	Pending
------------------	---------

[Image snippet showing the "Initial Submission Actions" drop-down menu with "Add New" highlighted, and "Field Update" selected.]

11. click Add New --> Email Alert, and configure it with these values.
  - Description: Submission Email Alert
  - Unique Name: Auto Populates
  - Email Template: Submission Template
  - Recipient Type: Select your Name
12. Repeat the Steps 10 - 11 for Final Approval and Final Rejection actions.

✓ Data
 

Mass Transfer **Approval** Requests

✓ Feature Settings
 

**Approval** Settings

✓ Process Automation
 

**Approval** Processes

Didn't find what you're looking for?  
 Try using Global Search.

SETUP

## Approval Processes

12:48 pm

1:12 pm

**Initial Submission Actions** ⓘ
 

Add Existing Add New ▼

Action	Type	Description
	Record Lock	Lock the record from being edited
<a href="#">Edit</a>   <a href="#">Remove</a>	Field Update	<a href="#">Submitted</a>
<a href="#">Edit</a>   <a href="#">Remove</a>	Email Alert	<a href="#">Submission Email Alert</a>

**Approval Steps** ⓘ
 

New Approval Step

Action	Step Number	Name	Description	Criteria	Assigned Approv
<a href="#">Show Actions</a>   <a href="#">Edit</a>   <a href="#">Del</a>	1	Step 1			<a href="#">Manager</a>

**Final Approval Actions** ⓘ
 

Add Existing Add New ▼

Action	Type	Description
<a href="#">Edit</a>	Record Lock	Lock the record from being edited
<a href="#">Edit</a>   <a href="#">Remove</a>	Field Update	<a href="#">Submitted</a>
<a href="#">Edit</a>   <a href="#">Remove</a>	Email Alert	<a href="#">Submission Email Alert</a>

## CREATE A RECORD TRIGGERED FLOW:

### Configure The Start Element

1. From Setup, enter Flows in the Quick Find box, then select Flows.
2. Click New Flow.
3. Select Record-Triggered Flow.
4. Click Create. The Configure Start window opens.
5. For Object, select Appointment.
6. For Trigger the Flow When, select A record is created. The flow will look like this:



# **CREATE A SCREENFLOW FOR EXISTING STUDENT TO BOOK AN APPOINTMENT**

## **Add Screen Element**

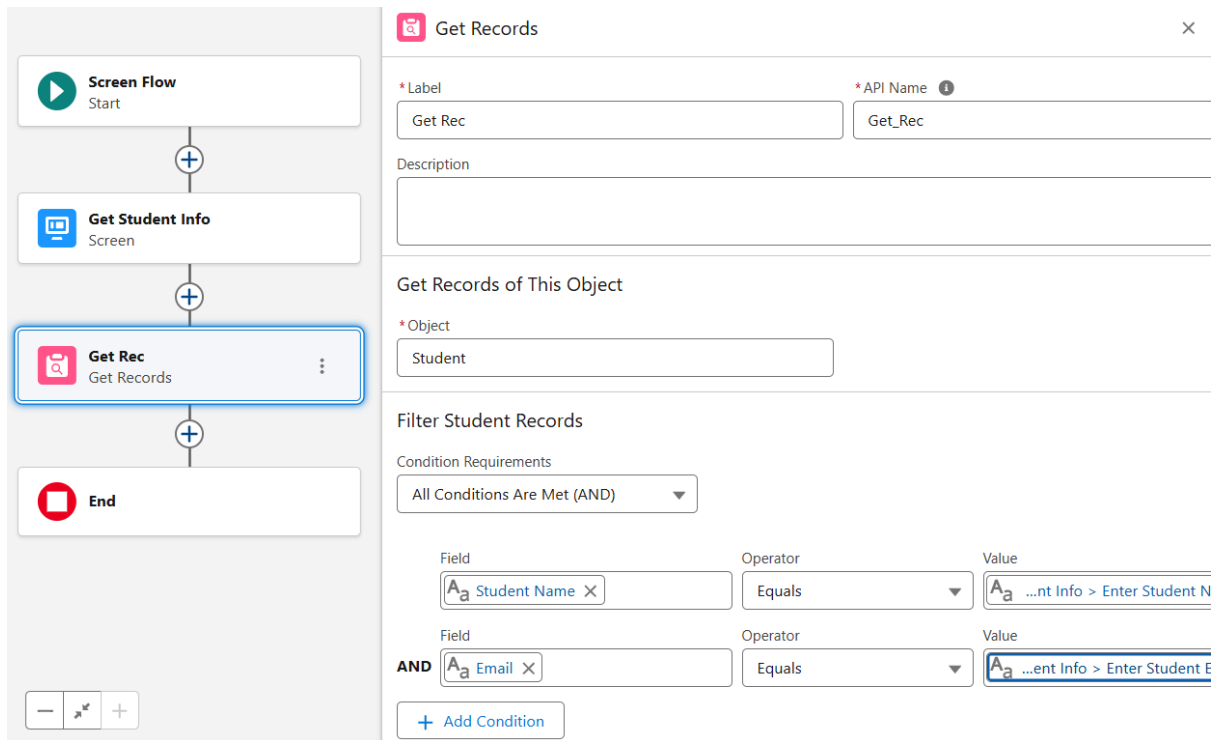
1. From Setup, enter Flow Builder in quick find, select new flow ? Screen Flow.
2. Add a Screen element.
3. In the Screen Properties pane, for Label, enter "Get Student Info".
4. Add two Text components from the left side panel. Give the Label's as follows:
  - o 1st Text Component Label : Enter Student Name
  - o 2nd Text Component Label : Enter Student Email
5. Click on Done.

## **Add GET Record Element**

1. Add a GET Record Element after Decision Element, under the IELTS path and label it as "Get Rec".
2. Select Object : Student

Condition Requirement : All Conditions are Met(AND)

- a. Field : Student Name  
Operator : Equals  
Value : {!Enter\_Student\_Name}
- b. Field : Email\_\_c  
Operator : Equals  
Value : {!Enter\_Student\_Email}

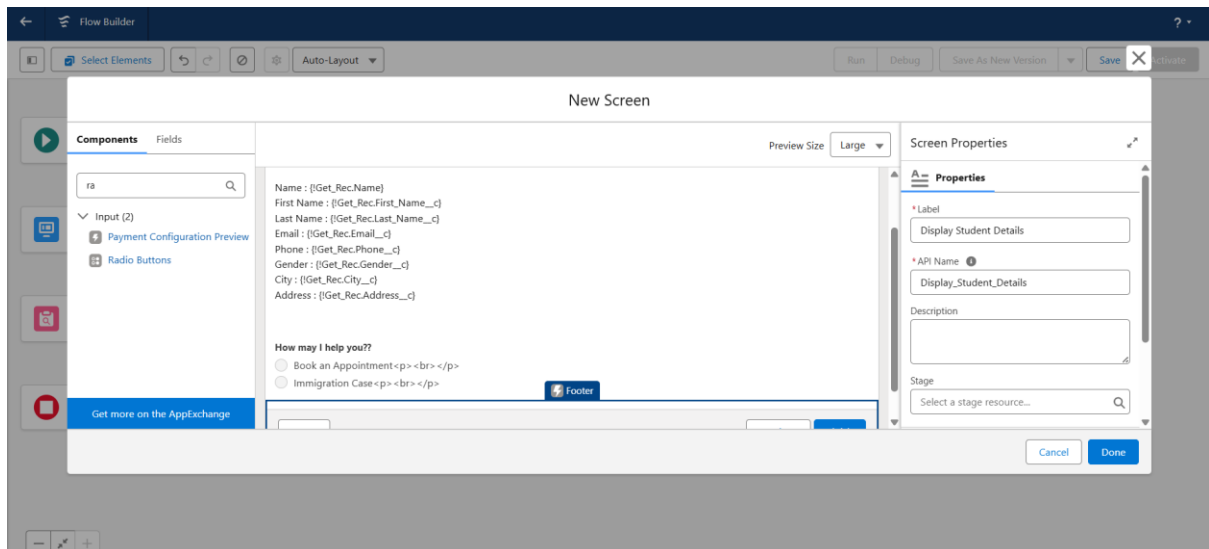


## Add Screen Element

1. From Setup, enter Flow Builder in quick find, select new flow ? ScreenFlow.
2. Add a Screen element.
3. In the Screen Properties pane, for Label, enter "Display Student Details".
4. Add Display Text components from the left side panel. Give the API name as "Display\_details", under Resource picker add the below text:

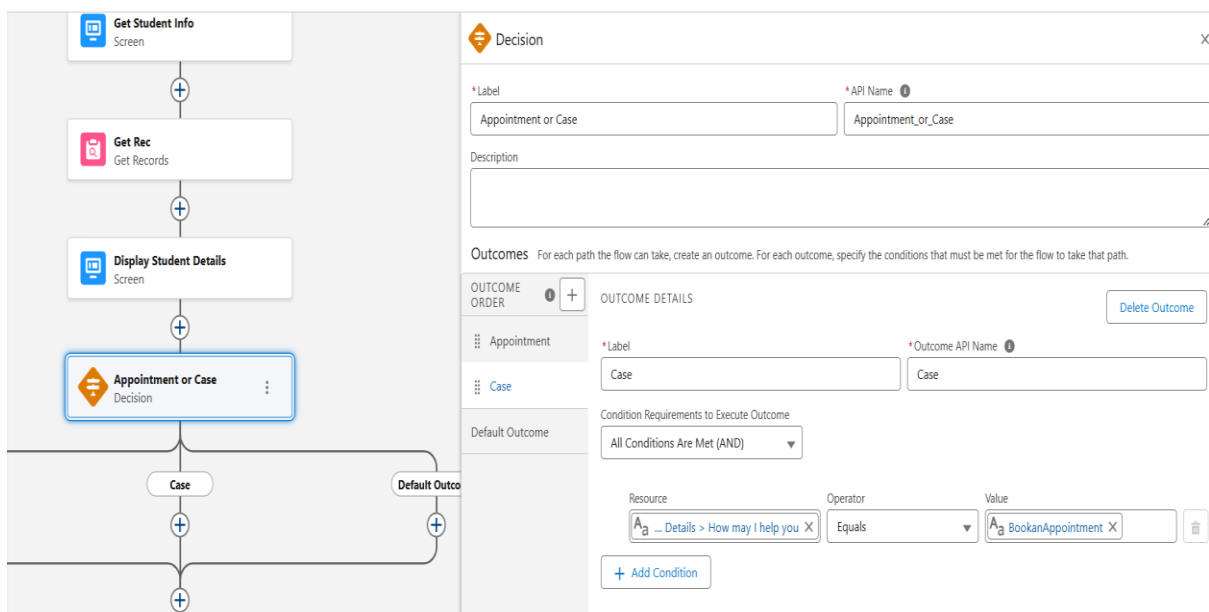
Name : {!Get\_Rec.Name} First Name : {!Get\_Rec.First\_Name\_\_c}, Last Name :  
 {!Get\_Rec.Last\_Name\_\_c}, Email : {!Get\_Rec.Email\_\_c}, Phone :  
 {!Get\_Rec.Phone\_\_c}, Gender : {!Get\_Rec.Gender\_\_c}, City : {!Get\_Rec.City\_\_c},  
 Address : {!Get\_Rec.Address\_\_c},

5. Add a radio button component from the left side panel, label : How may I help you??
6. Click on Add Choice ? type "Book an Appointment" in the input field ? click Create Book an Appointment choice.
7. Repeat step 6 and create an "Immigration Case" choice resource.



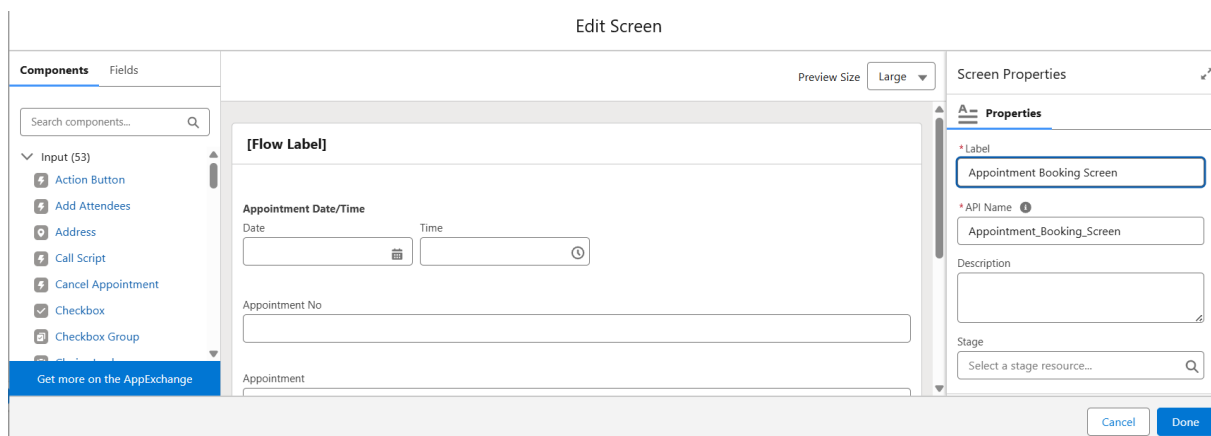
## Add Decision Element

1. Add a Decision Element after Select Display Student Details Element, label it as "Appointment or Case?".
2. Under outcome label it as "Appointment" and write the condition such as below:
  - Resource : {!How\_may\_I\_Help\_you}
  - Operator : Equals
  - Value : {!Book\_an\_Appointment}
3. Click on the "+" icon and Repeat step 2 for Case options mentioned.



## Add Screen Element

1. Add a Screen element after the Decision Element and label it as "Appointment Booking Screen".
2. Click on Fields, click on the record variable input and create a new Resource (AppointmentRecordRes) to display all the fields which are in the Appointment object.
3. Drag all the fields that are needed to add on the screen in order to collect the student information.
4. Click on Done.



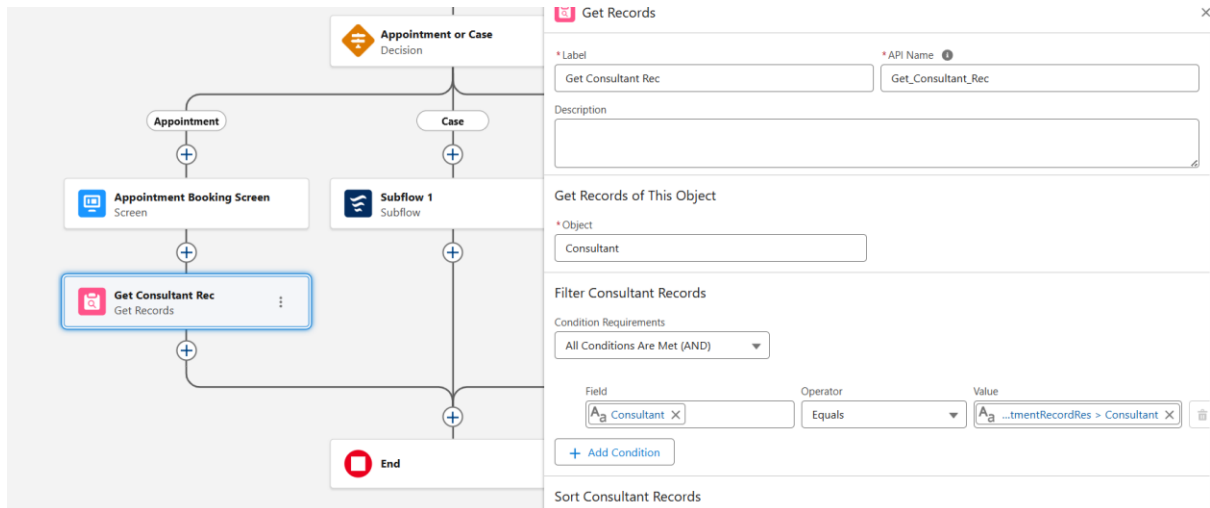
## Add GET Record Element

1. Add a GET Record Element after Decision Element, under the Appointment path and label it as "Get Consultant Rec".
2. Select Object : Consultant

Condition Requirement : All Conditions are Met(AND)

a. Field : Name Operator : Equals Value :  
{!AppointmentRecordRes.Consultant\_Name\_\_c}

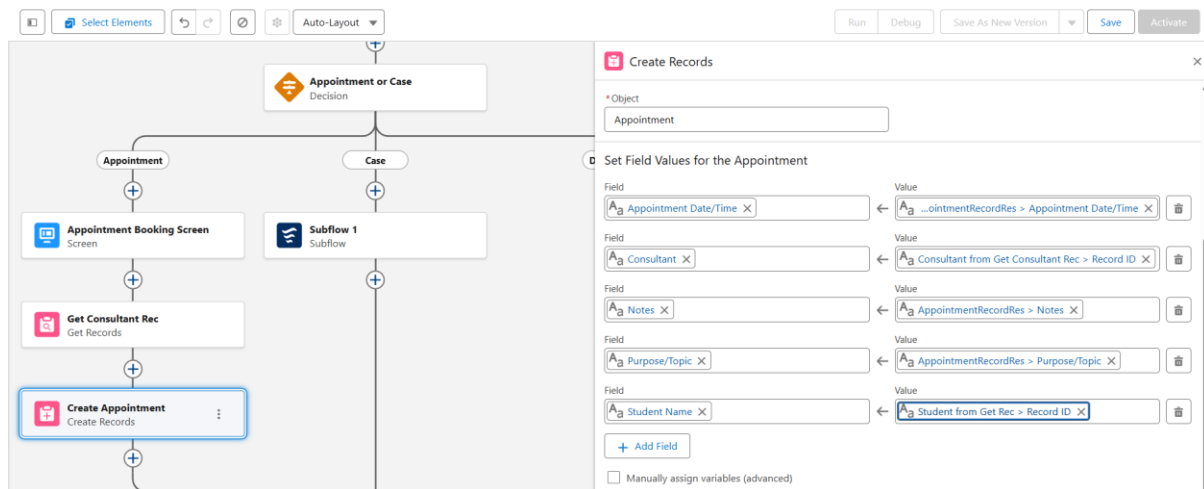




## Create Appointment Record Using Create Records Element

1. Add a Create element after the Get Consultant Rec element and label it as "Create Appointment".
2. Select "one" under How many records to Create, and select "Use separate resources, and literal values" under How to Set the record fields.
3. Select Object : Appointment
  - a. Field : Appointment\_DateTime\_\_c Value : `{!AppointmentRecordRes.Appointment_DateTime__c}`
  - b. Field : Consultant\_\_c Value : `{!Get_Consultant_Rec.Id}`
  - c. Field : Notes\_\_c Value : `{!AppointmentRecordRes.Notes__c}`
  - d. Field : PurposeTopic\_\_c Value : `{!AppointmentRecordRes.PurposeTopic__c}`

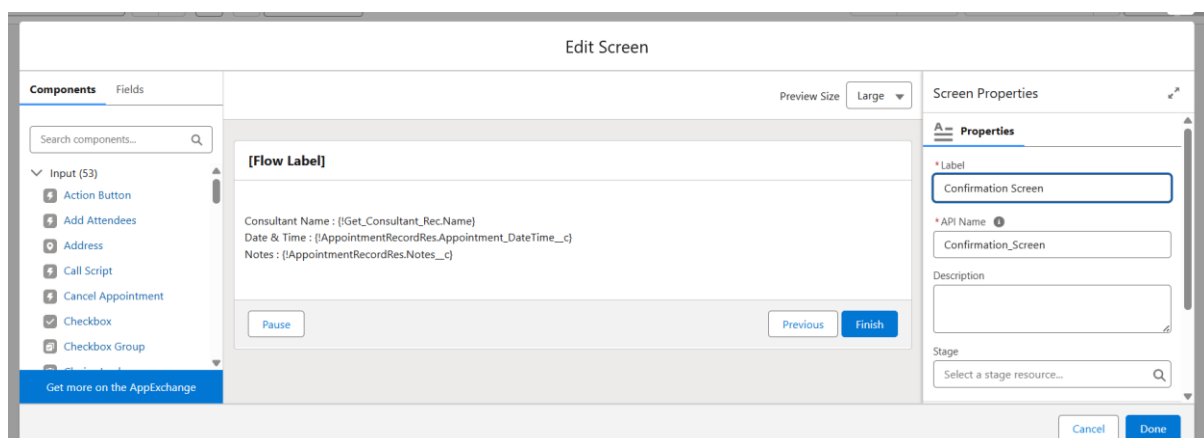
e. Field : Student\_Name\_\_c Value : {!Get\_Rec.Id}



## Add Screen Element

1. Add a Screen Element after the Send Email to Student Action Element, label it as "Confirmation Screen".
2. From the left side panel search for the Display text component and drag it to the main panel, label it as "Appointment\_Confirmation".
3. Paste the below in the Resource picker box.

Consultant Name : {!Get\_Consultant\_Rec.Name}, Date & Time :  
 {!AppointmentRecordRes.Appointment\_DateTime\_\_c}, Notes :  
 {!AppointmentRecordRes.Notes\_\_c},



## **Add An SubFlow Element**

1. Add a subflow element after the Start Element and search and Select for "Create a Case", label it as "Create Student Case".
2. Save the flow and label it as "EduConsultantPro Existing Student Flow".

## **CREATE A SCREENFLOW TO COMBINE ALL THE FLOWS AT ONE PLACE:**

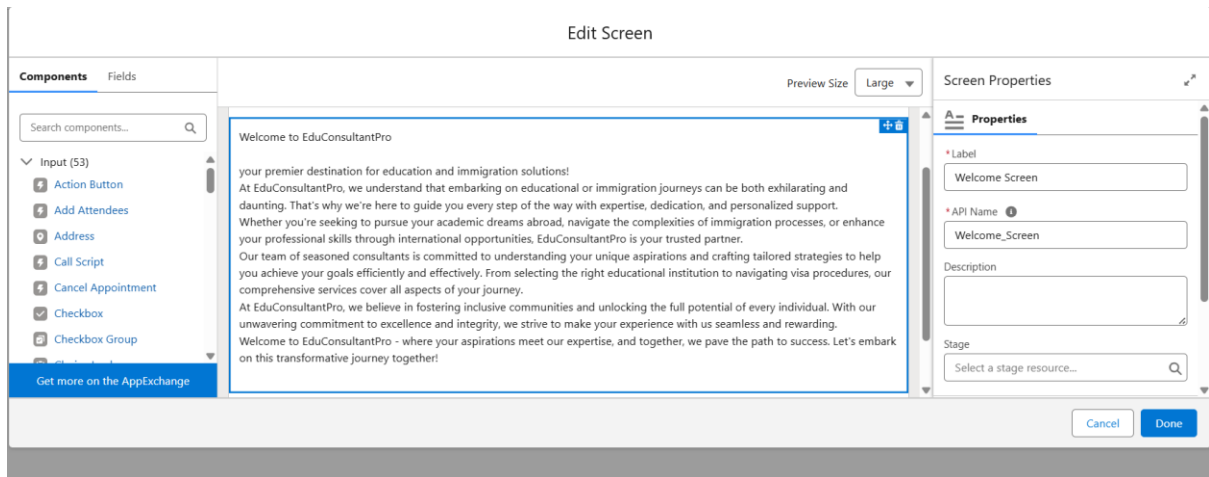
### **Add Screen Element**

1. Add a Screen Element and label it as Welcome Screen.
2. From the left side panel search for the Display text component and drag it to the main panel, label it as "SuccessMessage".
3. Paste the below in the Resource picker box.

"Welcome to EduConsultantPro

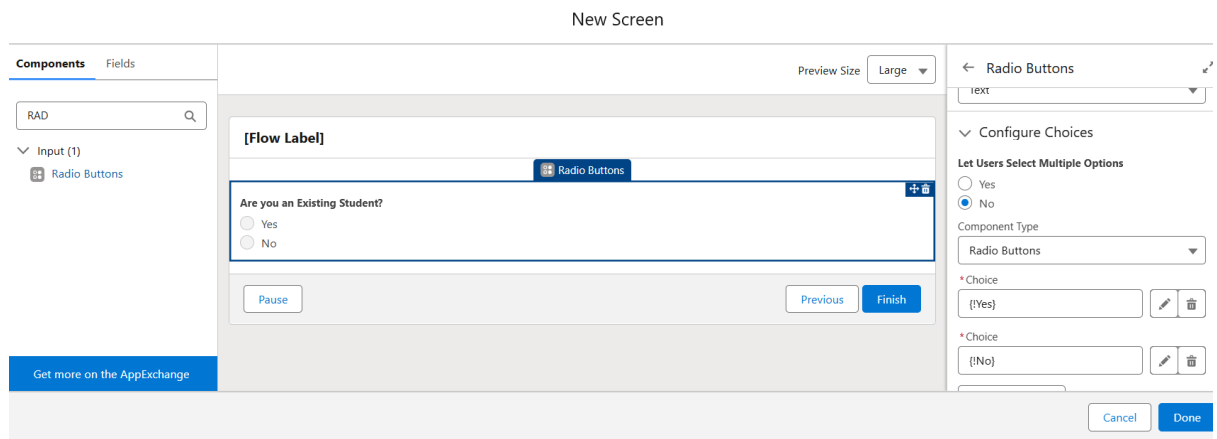
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4. Click Done.



## Add Screen Element

1. Add a Screen Element after the Welcome Screen Element, label it as "Existing or New Student Confirmation Screen".
2. Add a radio button component from the left side panel, label : Are you a Existing Student
3. Click on Add Choice --> type "Yes" in the input field --> click Create Yes choice.
4. Repeat step 6 and create an "No" choice resource.
5. Click Done.



## Add Decision Element

1. Add a Decision Element after Existing or New Student Confirmation Screen Element, label it as "Decision 1".
2. Under outcome label it as "If Existing Student" and write the condition such as below:

- Resource : {!Are\_you\_a\_Existing\_Student}
- Operator : Equals
- Value : {!Yes}

3. Click on the "+" icon and Repeat step 2 for No options mentioned.

The screenshot shows the 'Screen Flow' editor with a decision element 'Decision 1' selected. The left pane shows the flow structure: Start → Welcome Screen → Existing or New Student Confirmation Screen → Decision 1. The right pane shows the configuration for 'Decision 1'.

**Decision 1 Configuration:**

- Label:** Decision 1
- API Name:** Decision\_1
- Description:** (Empty)
- Outcomes:**
  - Outcome ORDER:** If Existing Student, If New Student
  - Outcome DETAILS:**
    - If Existing Student:**
      - Label:** If Existing Student
      - Outcome API Name:** If\_Existing\_Student
      - Condition Requirements to Execute Outcome:** All Conditions Are Met (AND)
      - Resource:** A ... > Are you an Existing Student
      - Operator:** Equals
      - Value:** A No
    - If New Student:** (Empty)
  - Default Outcome:** (Empty)

## Add An SubFlow Element

1. Add a subflow element after the Decision 1 Element on the If Existing Student path and search and Select for "EduConsultantPro Existing Student Flow", label it as "Existing Student Flow".
2. Save the flow and label it as "EduConsultantPro Existing Student Flow".

The screenshot shows the 'Screen Flow' editor with a subflow element 'New Student Flow' added to the 'If Existing Student' path. The right pane shows the configuration for 'New Student Flow'.

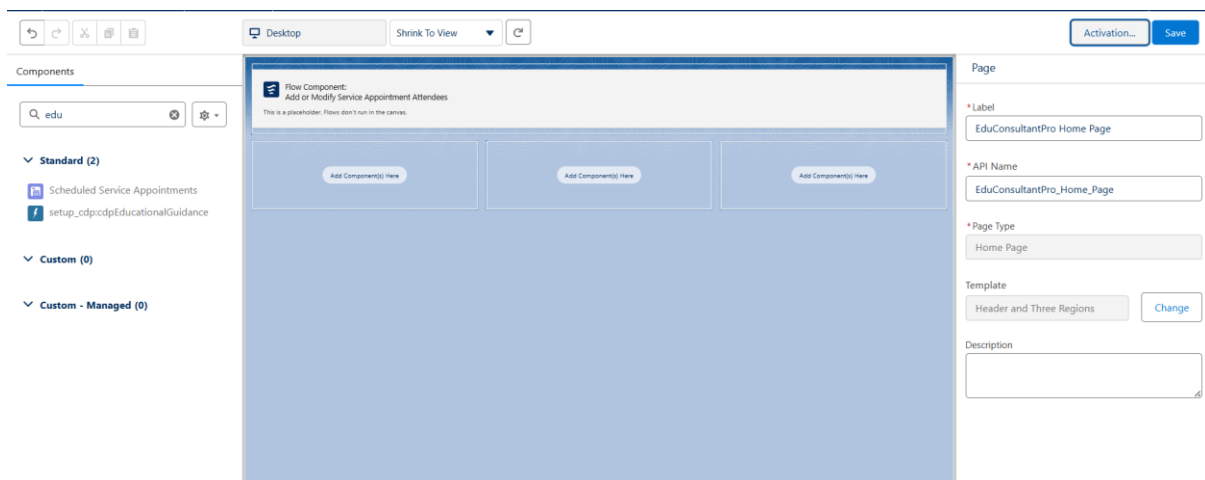
**New Student Flow Configuration:**

- Label:** New Student Flow
- API Name:** New\_Student\_Flow
- Description:** (Empty)
- Referenced Flow:**
  - Flow Name:** EduConsultPro Student Flow
  - API Name:** EduConsultPro\_Student\_Flow

Use values from the parent flow to set the inputs for the "EduConsultPro Student Flow" flow. The parent flow stores all outputs. You can either reference outputs via the API name in the parent flow to store individual output "EduConsultPro Student Flow" flow.

## Create A Lightning App Page

1. From Setup, enter App Builder in the Quick Find box, then click Lightning App Builder.
2. Click New, select Home Page, then click Next.
3. Step through the wizard and name the page "EduConsultPro Home Page", select the Standard Home Page template, and then click Done.
4. Drag the Flow component to the top-right region.
5. Search for the "EduConsultPro Flow" and click Save.
6. Click Activate, Click App and Profile, then click Assign to Apps and Profiles.
7. Select the Sales app, then click Next.
8. Scroll down the list of profiles and select System Administrator, then click Next.
9. Review the assignment, and then click Save.



10. Done