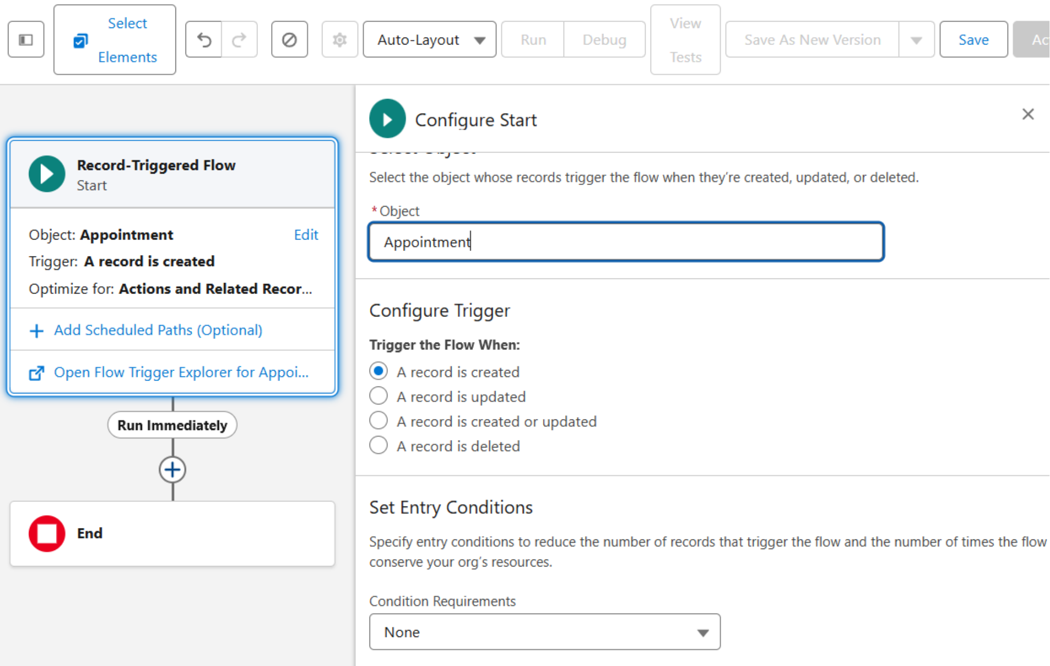
Phase 4: Process Automation for EduConsultPro

## Step 1: Define Goal

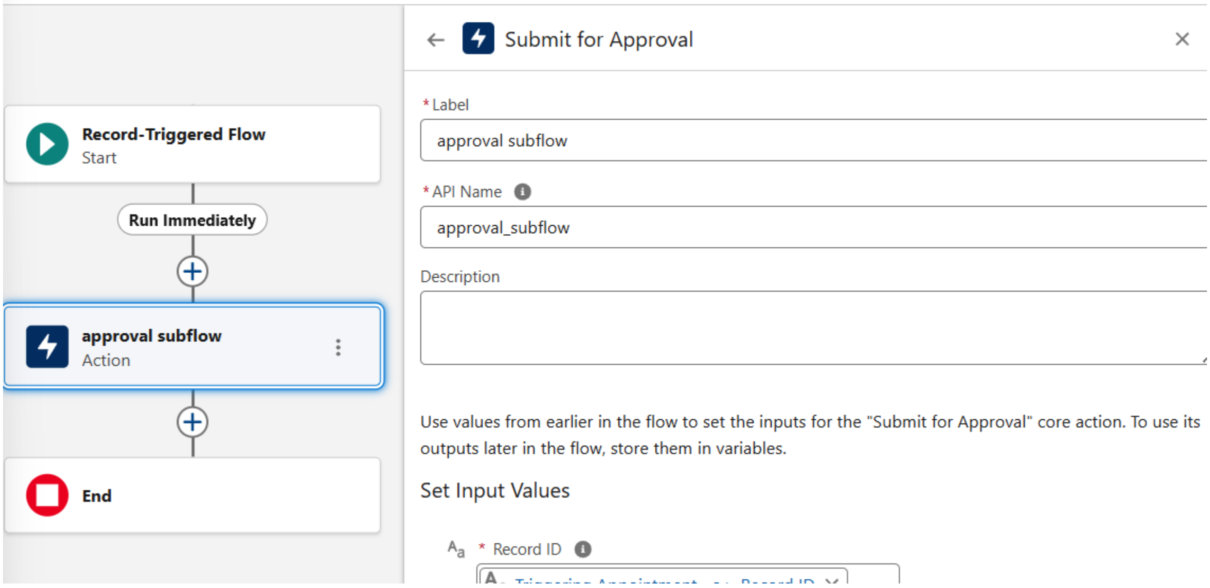
- Automate Student Application Status updates when Admission Application is created/updated.
- Reduce manual work, ensure real-time updates, minimize errors.

## Step 2: Create Record-Triggered Flow

1. Setup → Flows → New Flow.
2. Select **Record-Triggered Flow** → Create.
3. Object: **Appointment**.
4. Trigger: **When a record is created**.
5. Add **Action Element** → Select **Submit for Approval** → Label: "Approval SubFlow".
6. Set **RecordId = {!$Record.Id}**.

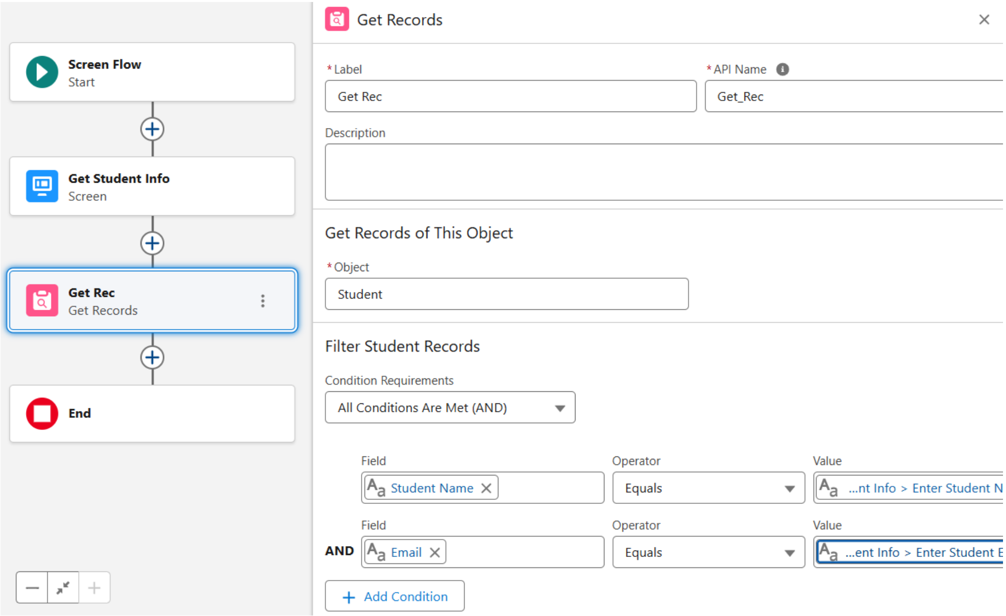


Action Element:

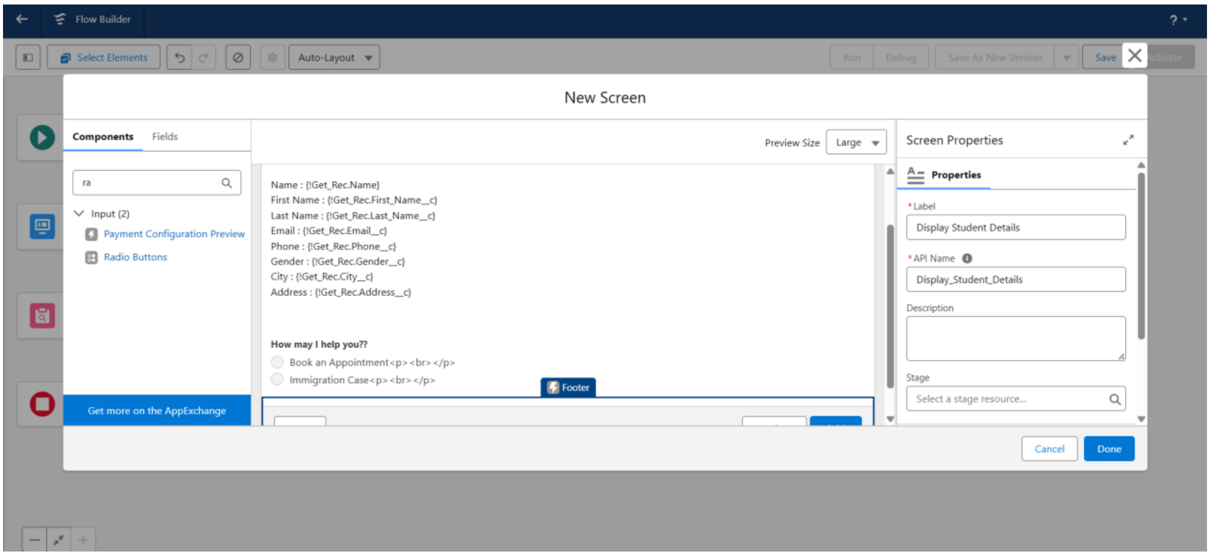



## Step 3: Screen Flow for Existing Student

1. Setup → Flow Builder → New Flow → Screen Flow.



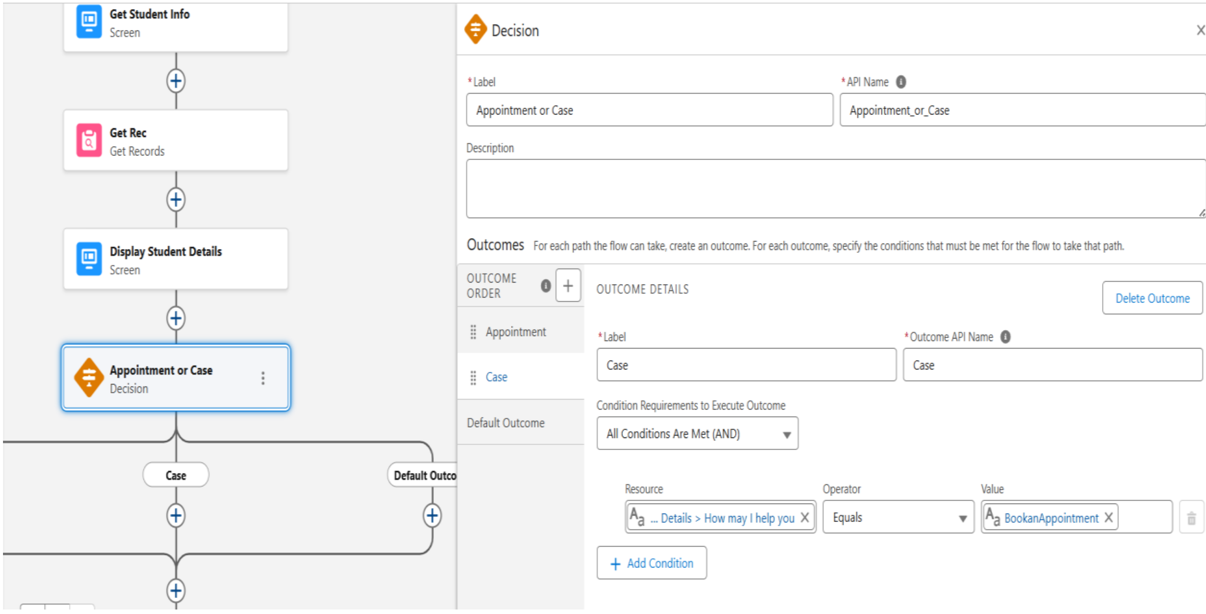

2. Add **Screen Element** → Label: "Get Student Info".
   - Add 2 Text Components → Labels: "Enter Student Name", "Enter Student Email".




3. Add **Get Record Element** → Label: "Get Rec".
   - Object: **Student**.
   - Conditions: Student Name = {!Enter_Student_Name}, Email__c = {!Enter_Student_Email}.

4. Add **Screen Element** → Label: "Display Student Details".
   - Display Text with Student fields (Name, Email, Phone, etc.).
   - Add **Radio Buttons** → Label: "How may I help you?"
   - Create Choices: "Book an Appointment", "Immigration Case".
5. Add **Decision Element** → Label: "Appointment or Case?"
   - Outcome 1: Appointment → {!How_may_I_Help_you} = {!Book_an_Appointment}.

- Outcome 2: Case → {!How_may_I_Help_you} = {!Immigration_Case}.

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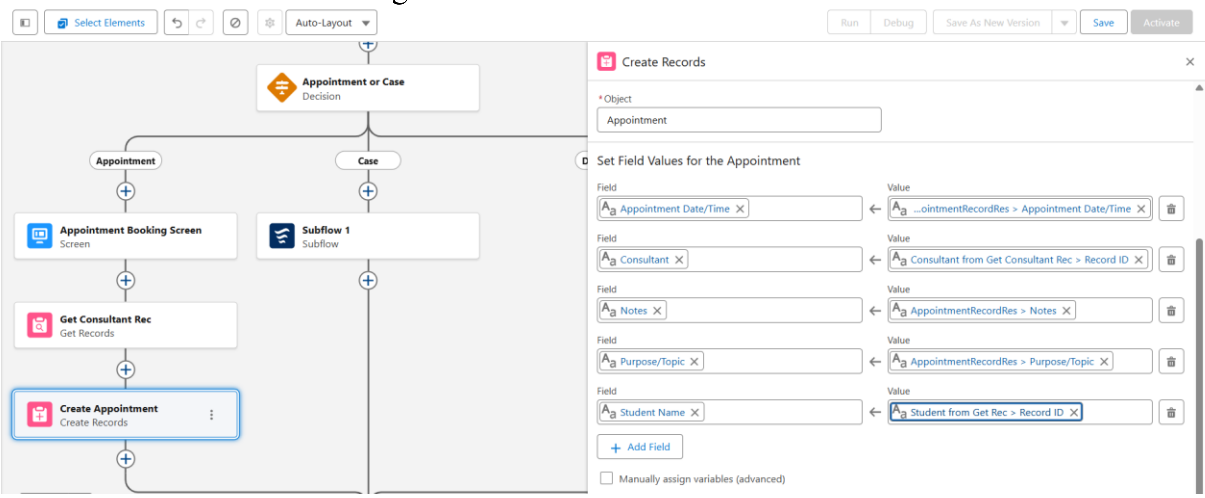
## Step 4: Check Application Status

1. Add **Decision Element** → Label: "Check Status".
   - Outcome 1: Approved → {$Record.Status__c} = "Approved".
   - Outcome 2: Rejected → {$Record.Status__c} = "Rejected".
   - Outcome 3: Default → Pending/Other.

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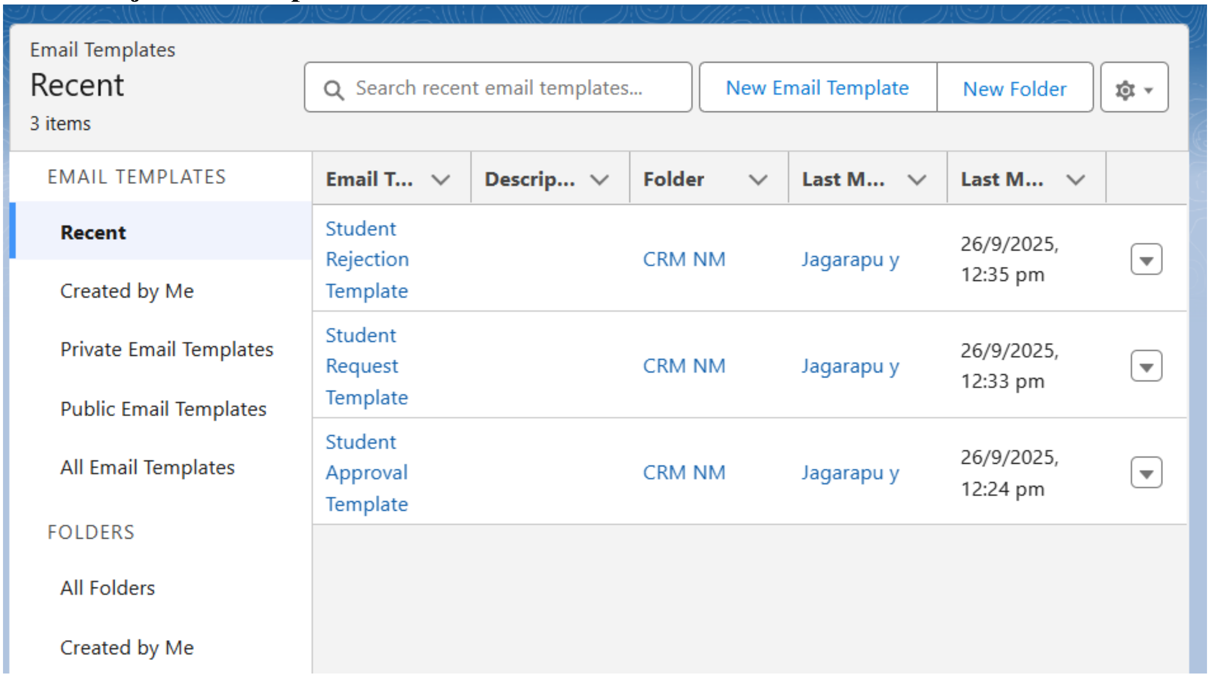
## Step 5: Create Email Templates

1. Setup → Templates → Lightning Email Template (ON).
2. Create Folder → Create New Template.
3. Add **Submission Template** (confirmation email).

4. Create **Approval Template**.
5. Create **Rejection Template**.

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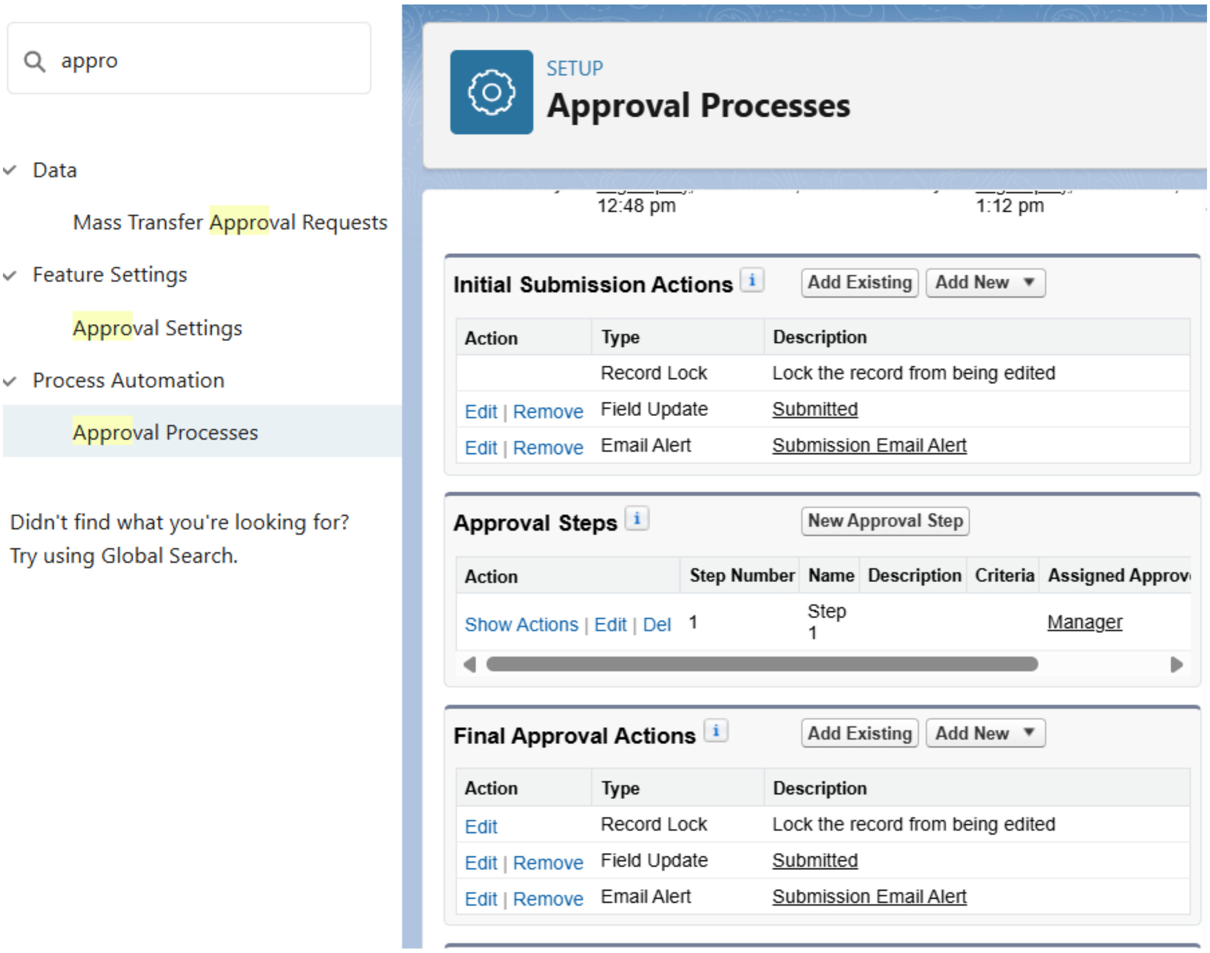
**Step 6: Create Approval Process**

1. Setup → Approval Processes → Appointment → New → Jump Start Wizard.
2. Process Name: **Appointment Approval**.
3. Select Approver → **Manager**.
4. Record Editability: **Admins/Assigned Approver**.
5. Save.
6. Configure Actions:
   - **Initial Submission Actions**:
     - Field Update → Status = Pending.
     - Email Alert → Submission Email Template.
   - **Final Approval Actions**:
     - Field Update → Status = Approved.
     - Email Alert → Approval Template.
   - **Final Rejection Actions**:
     - Field Update → Status = Rejected.
     - Email Alert → Rejection Template.

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### Step 7: Update Student Status

1. Add **Update Records Element** → Label: "Update_Student_Status".
2. Record: Student (from Get_Student).
3. Field: Status__c → Value: Approved / Rejected / Pending (based on Decision).

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### Step 8: Connect Flow Elements

- Start → Get_Student → Check Status → Update_Student_Status → End.
- Connect Approved, Rejected, Default paths.

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### Step 9: Save & Activate Flow

- **Flow Label:** EduConsultantPro Existing Student Flow
- **API Name:** `EduConsultantPro_Existing_Student_Flow`

- **Description:** Automatically updates Student__c status based on AdmissionApplication__c status when the record is created/updated.

Save → Activate.