A CRM Application to Manage the Services offered by an Institution

By

Shiva Kumar Yedla

yedlashivakumar1@gmail.com

Project Abstract

EduConsultPro Institute, a premier educational institution, offers a diverse array of courses and programs, attracting a ging number of prospective students each year. To efficiently manage the increasing volume of admission applications, student inquiries, and consulting services, the institute aims to implement a Customer Relationship Management (CRM) system using Salesforce. The project focuses on three core areas: Admission Application Management, Consulting Services Management, and Immigration Case Management.

Admission Application Management:Prospective students will access the admission application form.The form will collect detailed information including personal details. Submitted applications will be captured and stored in Salesforce CRM, with automated email notifications sent to students upon successful submission. Admissions staff will utilize Salesforce to generate reports and dashboards to analyze application metrics, acceptance rates, and enrollment trends.

Consulting Services Management: Prospective students will request consulting services through the institute's website or portal, capturing student details, consulting preferences, and required areas of expertise. Submitted requests will be recorded in Salesforce CRM, triggering automated email notifications to consultants. Consultants will manage requests within Salesforce, including viewing, accepting, and scheduling consulting appointments. The system will track appointment statuses and facilitate effective management of consulting engagements.

The implementation of Salesforce CRM at EduConsultPro Institute aims to streamline the admission process, enhance the management of consulting services, and improve the efficiency of immigration case handling, thereby providing a seamless and transparent experience for students and staff.

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1. Introduction

EduConsultPro Institute, renowned for its comprehensive educational offerings, is experiencing a significant increase in prospective students. To manage the growing volume of admission applications, student inquiries, and consulting service requests, the institute is implementing a Salesforce CRM system. This project aims to streamline key operational areas, enhancing efficiency and service delivery.

The core areas of focus are:

1. Admission Application Management: Automating the application process to efficiently handle high volumes, capturing detailed student information, and providing automated notifications and insightful reporting.
2. Consulting Services Management: Improving the management of consulting requests to provide personalized guidance to students, including the ability to request, schedule, and manage consulting appointments seamlessly.
3. Immigration Case Management: Enhancing the tracking and handling of immigration cases for international students, ensuring compliance and timely support.

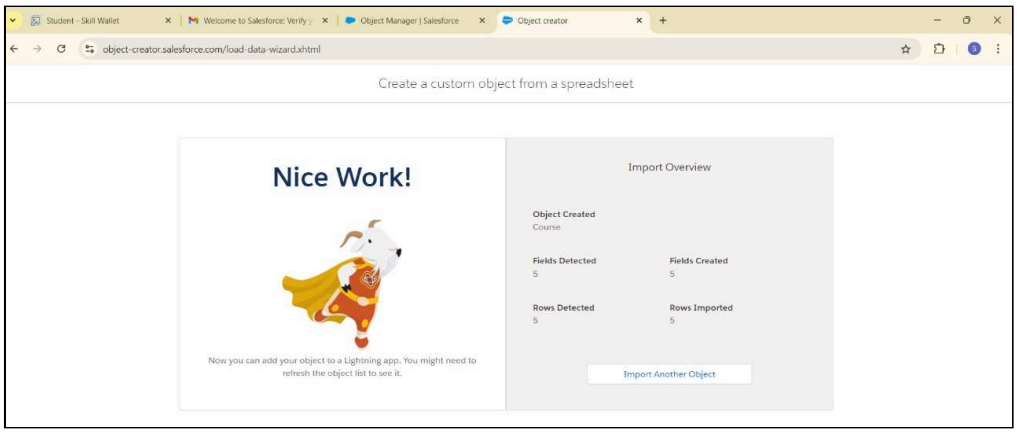
The project involves several key components, including creating custom objects to structure data effectively, developing intuitive screen flows to guide users through various processes, and implementing approval processes to ensure proper handling of specific tasks. Additionally, a unified interface will be designed to provide easy access to these functionalities, along with a custom Lightning app page to enhance the overall user experience.

By implementing Salesforce CRM, EduConsultPro Institute aims to achieve greater operational efficiency, improved data management, and an enhanced experience for both students and staff. This project will provide a robust foundation for managing the institute's growing needs and ensuring continued excellence in educational service delivery.

2. Creating Objects from Spreadsheet

2.1 Create Course object

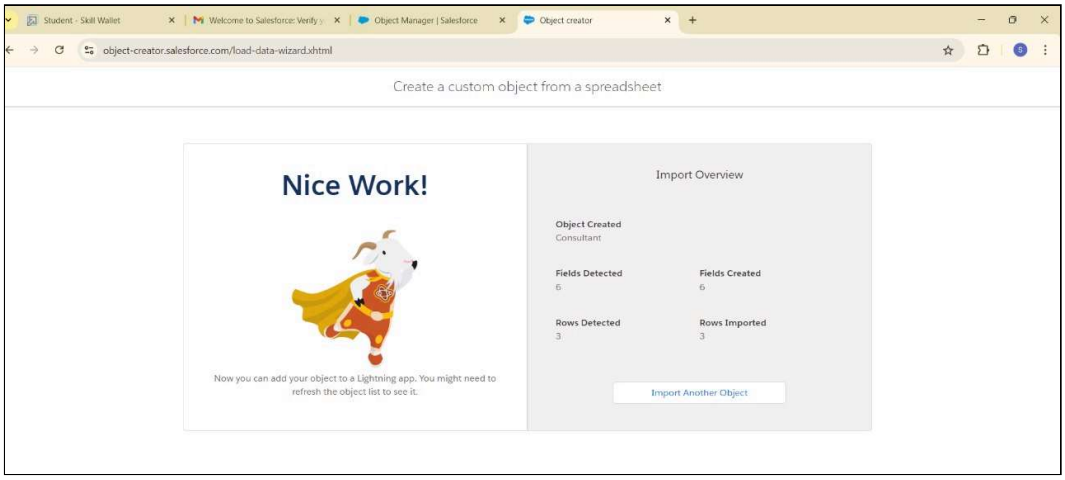
- Go to your object manager in Salesforce.
- Click on "Custom Object from Spreadsheet."
- Download the spreadsheet for the course.
- Upload the file to Salesforce.
- Map the fields accordingly.
- Upload the file to create the object.

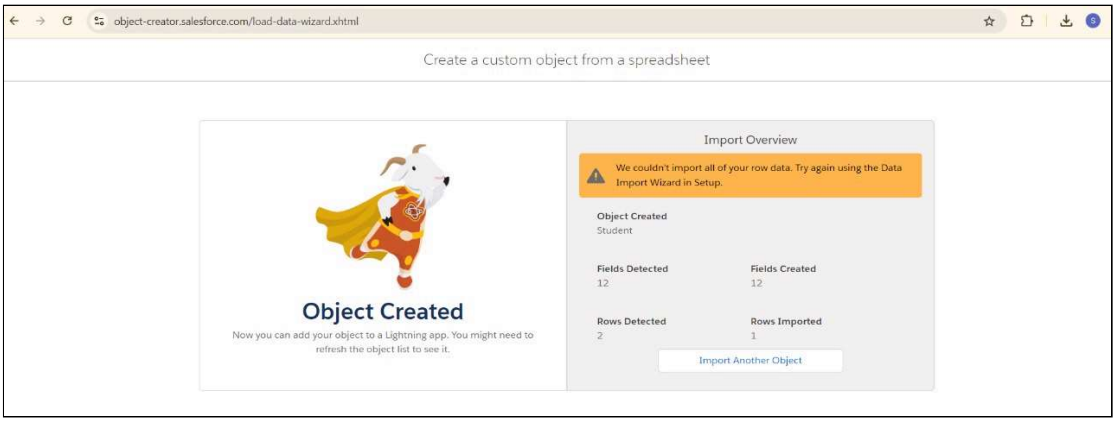


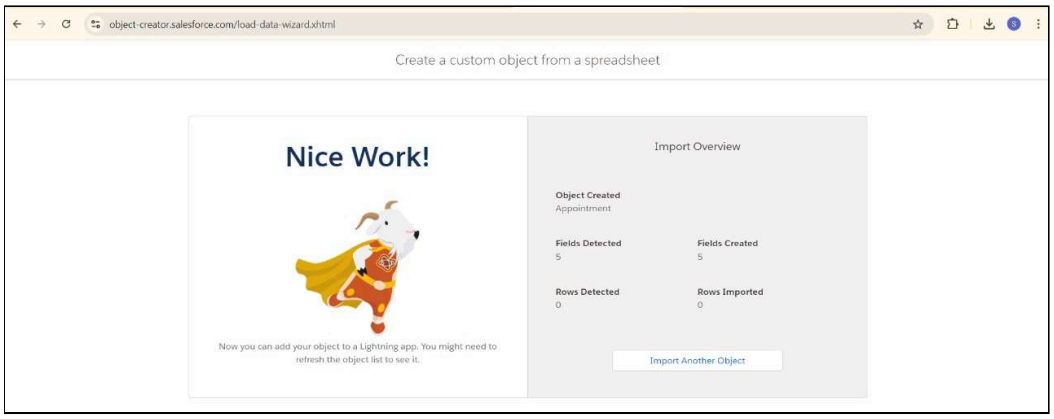
2.2 Creating Remaining Objects:

Follow the same steps used for creating the course object:

- Go to your object manager in Salesforce.
- Click on "Create Object from Spreadsheet."
- Download the following spreadsheets:
- Consultant
- Student
- Appointment
- Upload each file to Salesforce.
- Map the fields accordingly.
- Upload each file to create the respective objects.







2.3 Create Lookup Relationships:

Between Appointment and Student:

- Go to Object Manager and select the "Appointment" object.
- Click on "Fields & Relationships" and then "New."
- Select "Lookup Relationship" and click "Next."

- Choose "Student" as the related object and click "Next."
- Complete the required details and save the relationship.

Between Appointment and Consultant:

- Go to Object Manager and select the "Appointment" object.
- Click on "Fields & Relationships" and then "New."
- Select "Lookup Relationship" and click "Next."
- Choose "Consultant" as the related object and click "Next."
- Complete the required details and save the relationship.

2. Create the Registration Object:

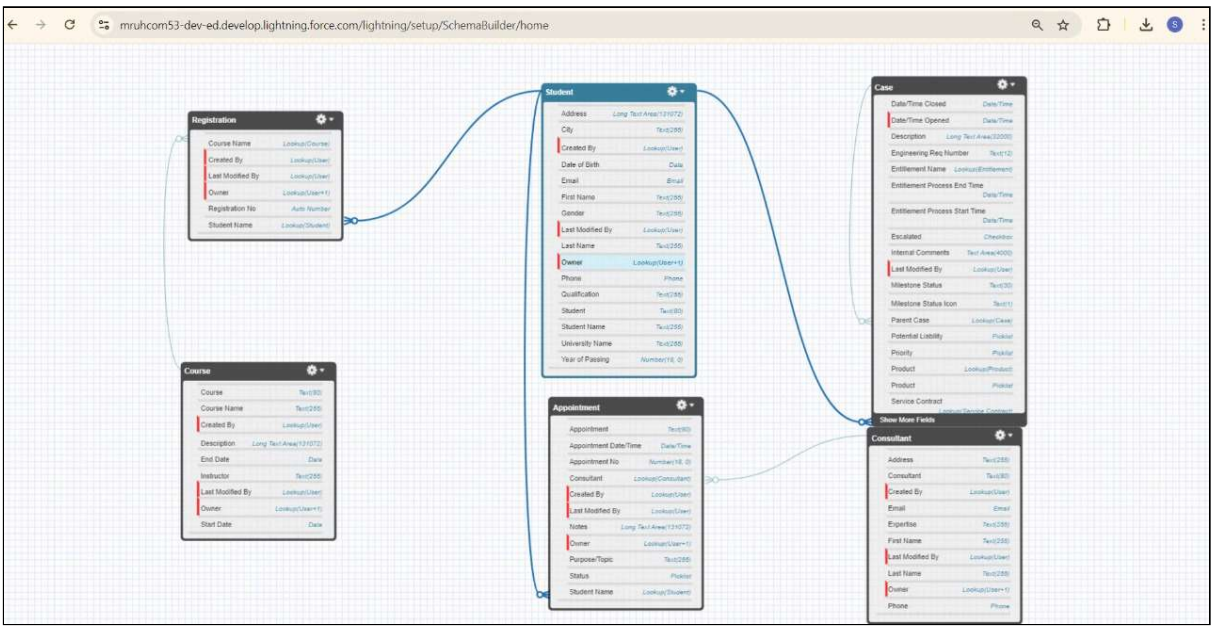
Steps to Create the Registration Object:

- Go to Object Manager and click on "Create Custom Object."
- Name the object "Registration."
- Add fields to capture student and course details (e.g., Student ID, Course ID).
- Save the object.

3. Create Lookup Between Student and Case:

Steps to Create Lookup Relationship:

- Go to Object Manager and select the "Case" object.
- Click on "Fields & Relationships" and then "New."
- Select "Lookup Relationship" and click "Next."
- Choose "Student" as the related object and click "Next."
- Complete the required details and save the relationship.



2.4 Configure the Case Object

Edit the Case Object:

- Go to Object Manager in Salesforce.
- Select Case from the list of objects.

Add Values to the "Type" Field:

- In the Case object, click on Fields & Relationships.
- Find and select the Type field.
- Click New to add a new picklist value.
- Enter Immigration and click Save & New.
- Enter Visa Application and click Save.

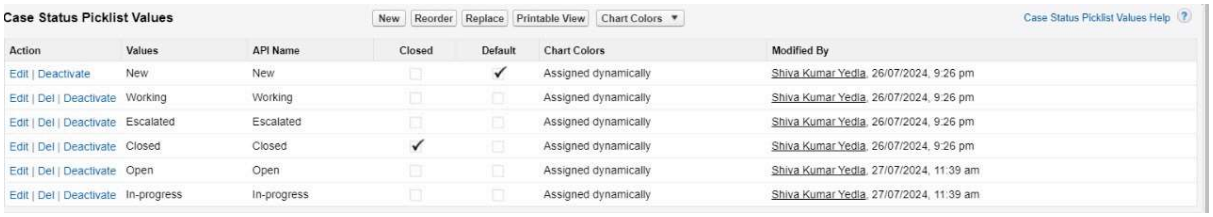
Case Type Picklist Values New | Reorder | Replace | Printable View | Chart Colors — Case Type Picklist Values Help

Action	Values	API Name	Default	Chart Colors	Modified By
Edit | Del | Deactivate	Mechanical	Mechanical		Assigned dynamically	Shiva Kumar Yedla, 26/07/2024, 9:26 pm
Edit | Del | Deactivate	Electrical	Electrical		Assigned dynamically	Shiva Kumar Yedla, 26/07/2024, 9:26 pm
Edit | Del | Deactivate	Electronic	Electronic		Assigned dynamically	Shiva Kumar Yedla, 26/07/2024, 9:26 pm
Edit | Del | Deactivate	Structural	Structural		Assigned dynamically	Shiva Kumar Yedla, 26/07/2024, 9:26 pm
Edit | Del | Deactivate	Other	Other		Assigned dynamically	Shiva Kumar Yedla, 26/07/2024, 9:26 pm
Edit | Del | Deactivate	Immigration	Immigration		Assigned dynamically	Shiva Kumar Yedla, 27/07/2024, 11:38 am
Edit | Del | Deactivate	Visa Application	Visa Application		Assigned dynamically	Shiva Kumar Yedla, 27/07/2024, 11:38 am

Add Values to the "Status" Field:

- In the Case object, go back to Fields & Relationships.
- Find and select the Status field.

- Click New to add a new picklist value.
- Enter Open and click Save & New.
- Enter In-progress and click Save.



Case Status Picklist Values

New | Reorder | Replace | Printable View | Chart Colors

Case Status Picklist Values Help

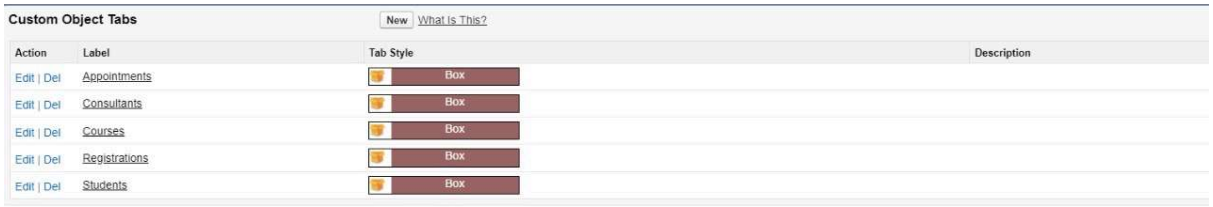
Action	Values	API Name	Closed	Default	Chart Colors	Modified By
Edit | Deactivate	New	New		✓	Assigned dynamically	Shiva Kumar Yedla, 26/07/2024, 9:26 pm
Edit | Del | Deactivate	Working	Working			Assigned dynamically	Shiva Kumar Yedla, 26/07/2024, 9:26 pm
Edit | Del | Deactivate	Escalated	Escalated			Assigned dynamically	Shiva Kumar Yedla, 26/07/2024, 9:26 pm
Edit | Del | Deactivate	Closed	Closed	✓		Assigned dynamically	Shiva Kumar Yedla, 26/07/2024, 9:26 pm
Edit | Del | Deactivate	Open	Open			Assigned dynamically	Shiva Kumar Yedla, 27/07/2024, 11:39 am
Edit | Del | Deactivate	In-progress	In-progress			Assigned dynamically	Shiva Kumar Yedla, 27/07/2024, 11:39 am

2.5 Create a Lightning App

- Go to Setup in Salesforce.
- In the Quick Find box, type App Manager and select it.

Create New Lightning App:

- Click on New Lightning App.
- Enter the app name as “EduConsultPro”.
- Click Next three times to proceed through the initial setup screens.



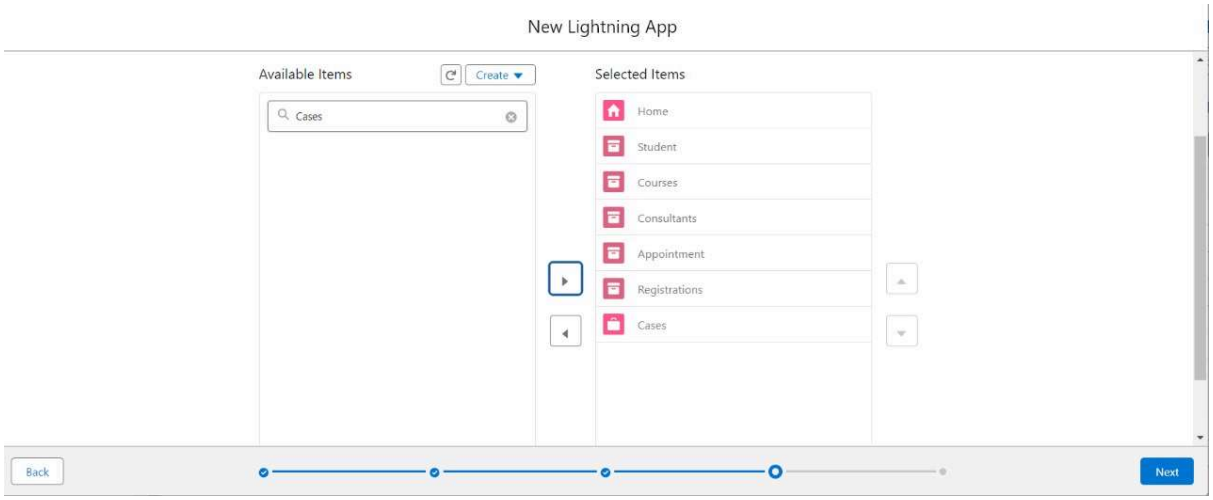
Custom Object Tabs

New | What Is This?

Action	Label	Tab Style	Description
Edit | Del	Appointments	Box	
Edit | Del	Consultants	Box	
Edit | Del	Courses	Box	
Edit | Del	Registrations	Box	
Edit | Del	Students	Box	

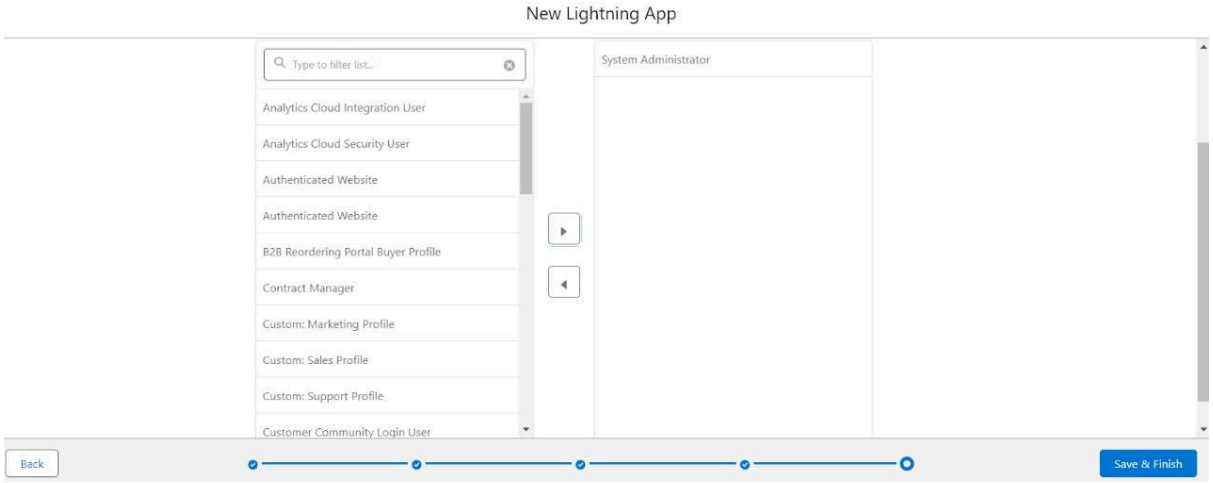
Add Items to the App:

- In the Available Items section, select and add the following to Selected Items:
  - Home
  - Students
  - Courses
  - Consultants
  - Appointments
  - Registrations
  - Cases



Add Profiles to the App:

- In the Available Profiles section, select System Administrator and add it to Selected Profiles.



Save and Finish:

- Click Save & Finish.

3. Creating a ScreenFlow for Student Admission Application process.

3.1 Add Screen Element

Create a New ScreenFlow:

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

Add a Screen Element:

- In the Flow Builder, drag the Screen element from the left sidebar to the canvas.
- In the Screen Properties pane, for Label, enter “Student Info”

Create a New Resource:

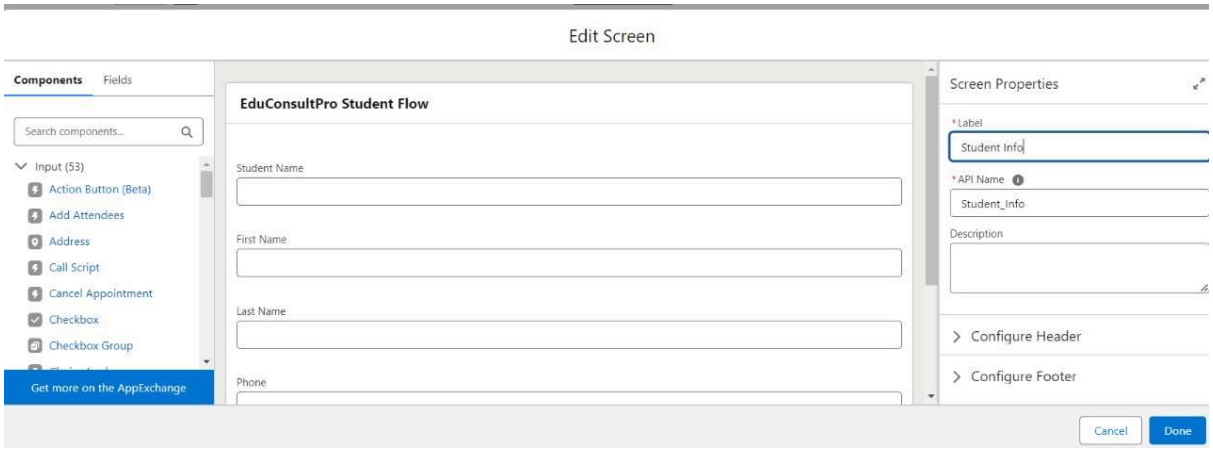
- Click on Fields.
- Click on the Record Variable Input and create a new resource.
- Name the resource StudentRecordRes.
- Select Record as the resource type.
- For the Object, select Student.
- Click Done to create the resource.

Add Fields to the Screen:

- Drag the fields you need from the Fields tab to the screen to collect student information. You may include fields like:
    - First Name
    - Last Name
    - Email
    - Phone

Configure and Save the ScreenFlow:

- After adding the necessary fields, click Done to complete the screen configuration.



3.2 Creating Student Record using Create Element

Add a Create Element:

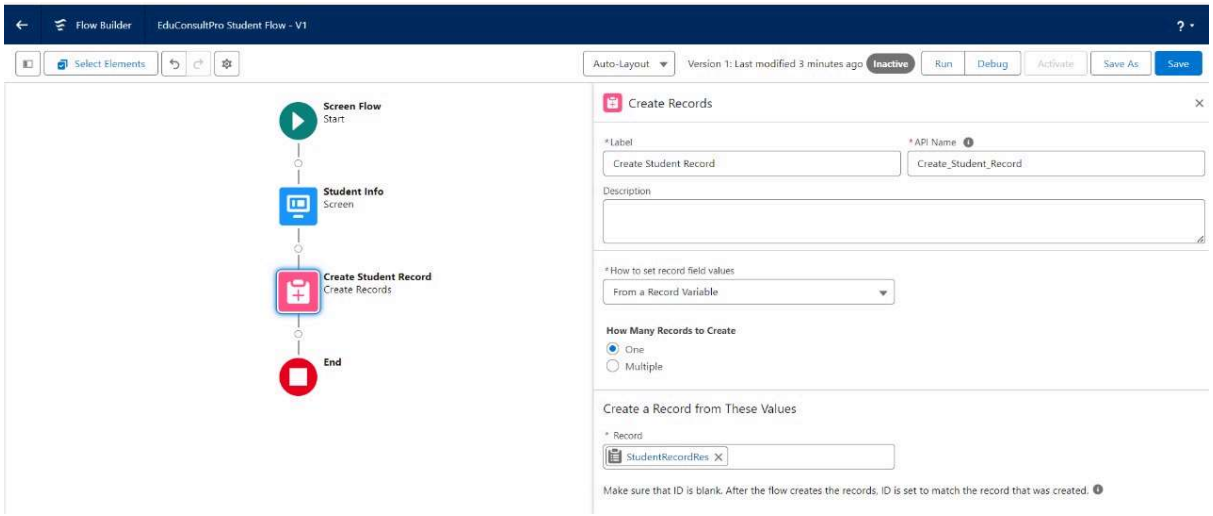
- In the Flow Builder, ensure you have the Student Info Screen element already added.
- Drag the Create Records element from the left sidebar to the canvas, placing it after the Student Info Screen element.
- In the Create Records properties pane, label it as “Create Student Record”.

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.

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 element.



3.3 Add Screen Element

Add a Screen Element:

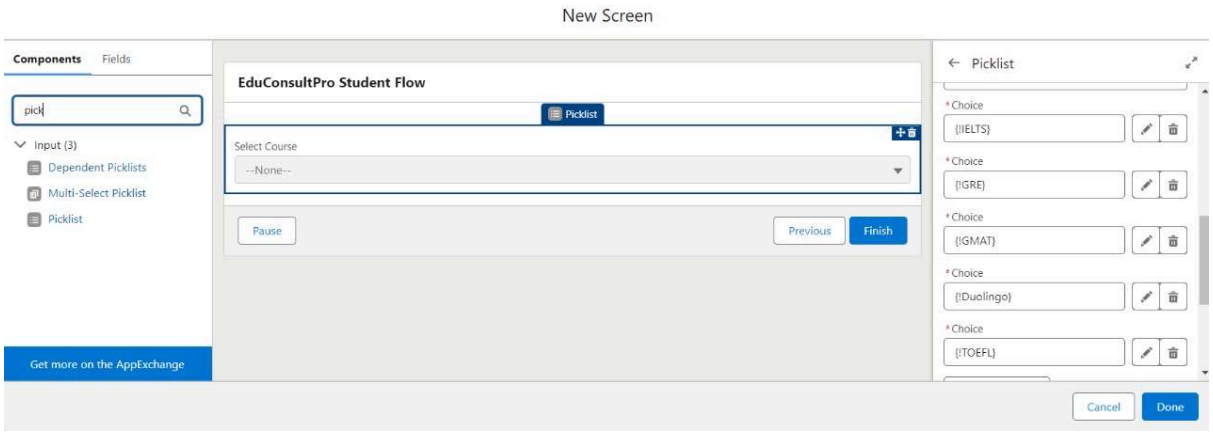
- In the Flow Builder, drag a Screen element from the left sidebar to the canvas, placing it after the Create Student Record element.
- In the Screen Properties pane, label it as “Course Screen”.

Add a Picklist Component:

- On the Course Screen, drag the Picklist component from the left sidebar to the screen.
- Label it as “Select Course”.

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. This will automatically create a variable named IELTS.
  - Repeat this process for the following choices:
    - GRE
    - GMAT
    - Duolingo
    - TOEFL



3.4 Add Decision Element

Add a Decision Element:

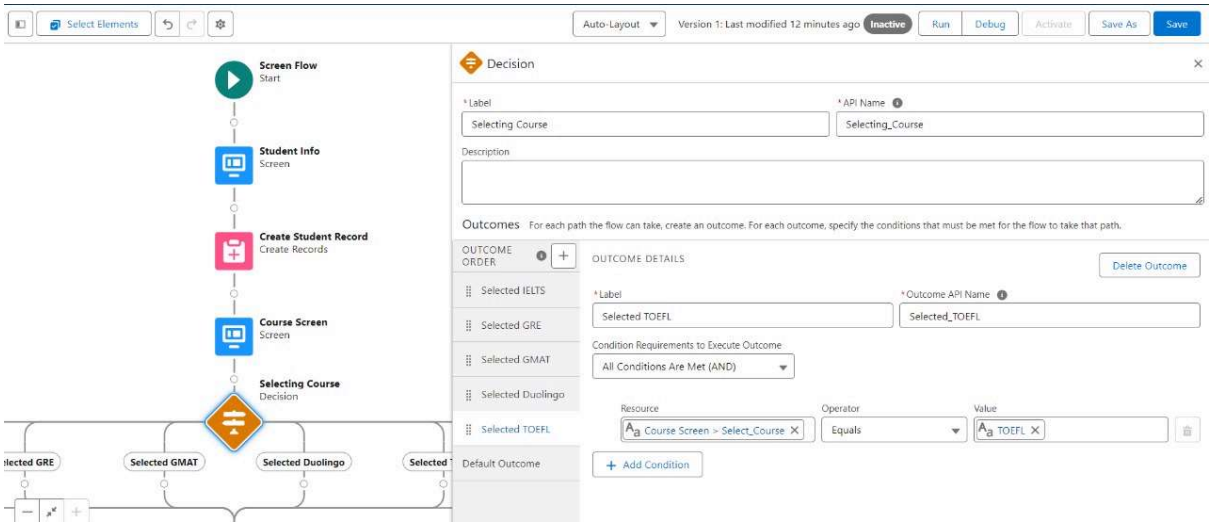
- In the Flow Builder, drag a Decision element from the left sidebar to the canvas, placing it after the Course Screen element.
- In the Decision Properties pane, label it as “Selecting Course”.

Configure the Decision Outcomes:

- Under Outcome 1, label it as “Selected IELTS”.
  - Resource: Select_Course (Picklist component from the Course Screen)
  - Operator: Equals
  - Value: {!IELTS} (Choice variable created from the Course Screen)
- Click on the + Add Outcome button to add a new outcome.
  - Label it as “Selected GRE”.
  - Resource: Select_Course
  - Operator: Equals
  - Value: {!GRE} (Choice variable created from the Course Screen)
- 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 Decision element configuration.



3.5 Add GET Record Element

Add a GET Record Element:

- In the Flow Builder, drag a Get Records element from the left sidebar to 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”.

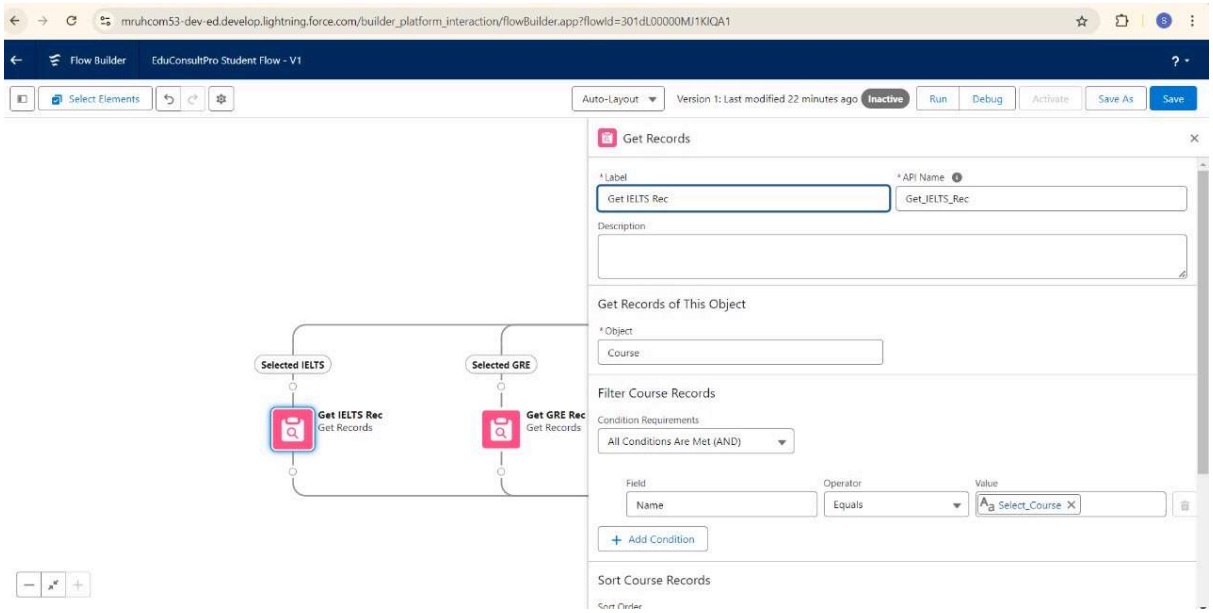
Configure the GET Record Element:

- Object: Course
- Condition Requirements: All Conditions Are Met (AND)

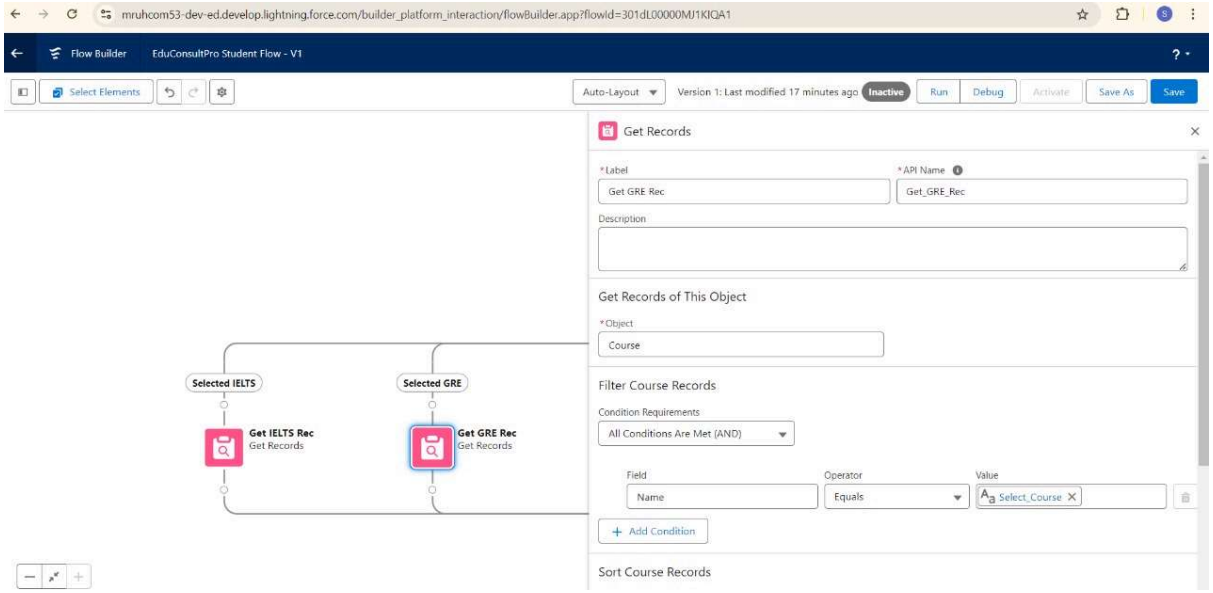
Add Condition:

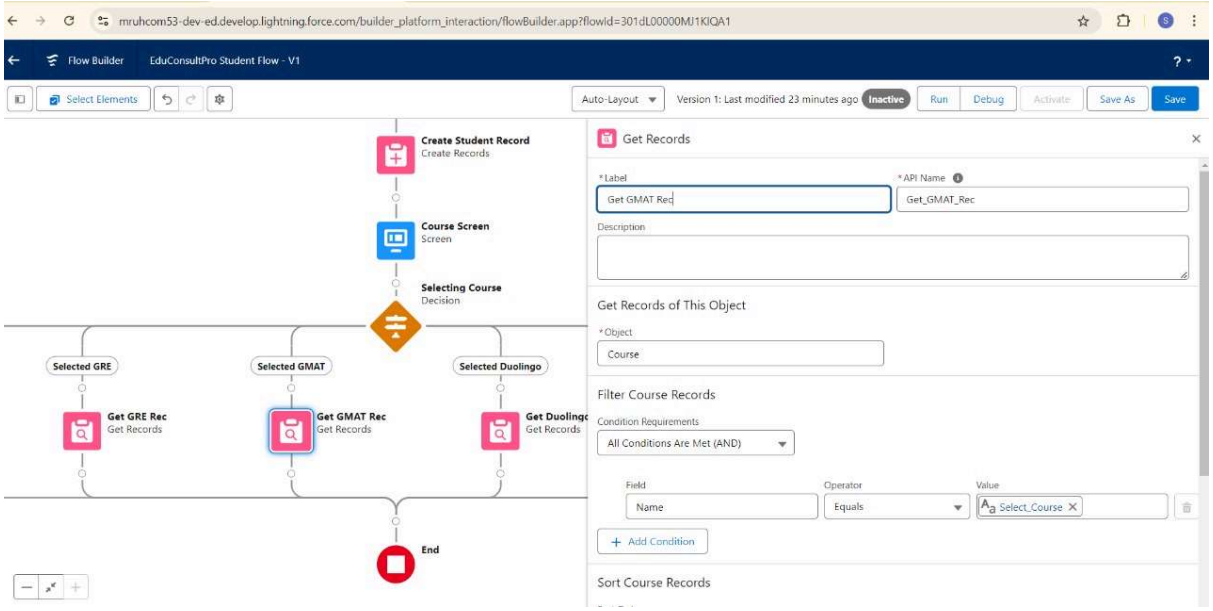
- Field: Course Name
- Operator: Equals
- Value: {!Select_Course} (Picklist component from the Course Screen)

Click Done to complete the GET Record element configuration



Repeat the same steps for the GRE, GMAT, TOEFL, DuoLingo paths.

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Flow Builder
EduConsultPro Student Flow - V1
Select Elements
Auto-Layout
Version 1: Last modified 23 minutes ago
Inactive
Run
Debug
Activate
Save As
Save
Create Student Record
Create Records
Course Screen
Screen
Selecting Course
Decision
Selected GRE
Selected GMAT
Selected Duolingo
Get GRE Rec
Get Records
Get GMAT Rec
Get Records
Get Duolingo
Get Records
End
Get Records
*Label
Get GMAT Rec
*API Name
Get_GMAT_Rec
Description
Get Records of This Object
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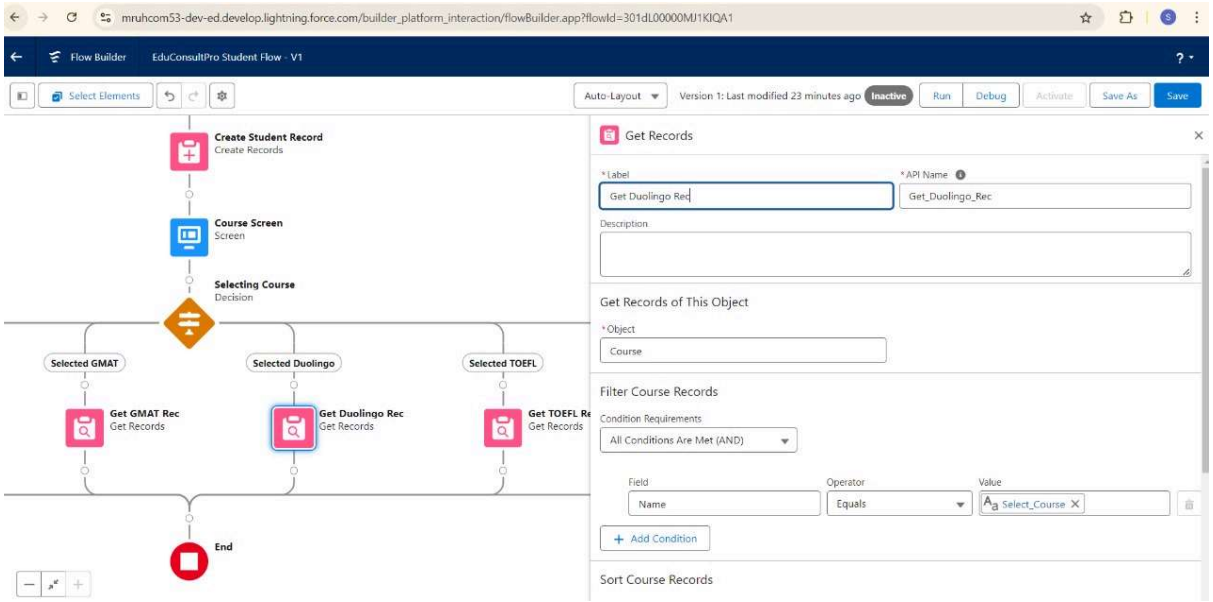
Field
Name
Operator
Equals
Value
Select_Course
Add Condition
Sort Course Records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Get Duolingo Rec
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Get TOEFL Re
Get Records
End
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*API Name
Get_Duolingo_Rec
Description
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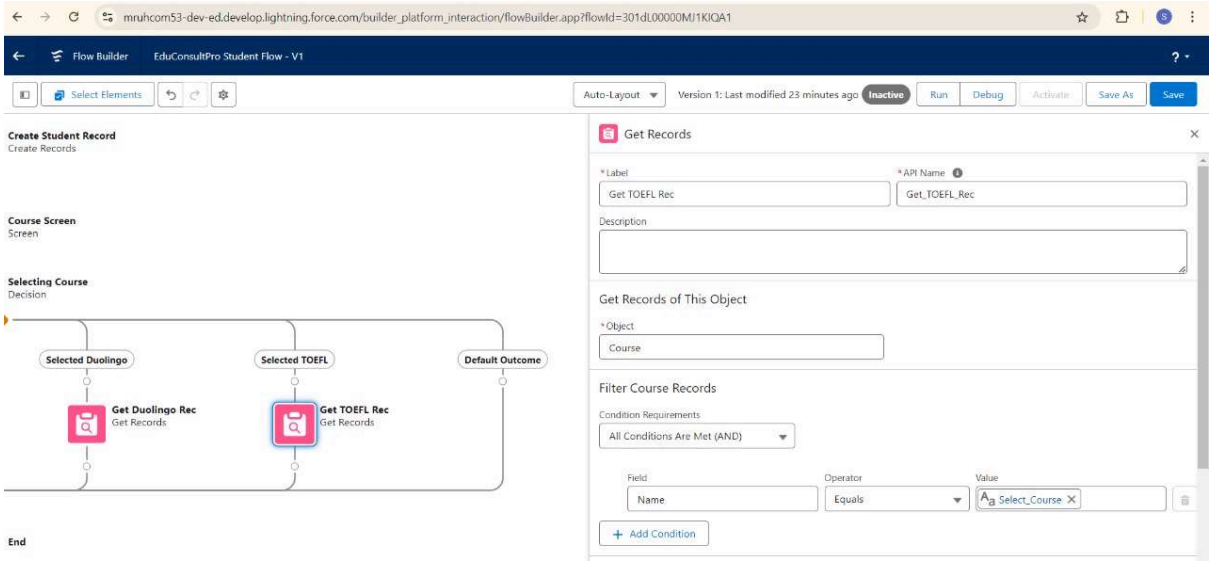
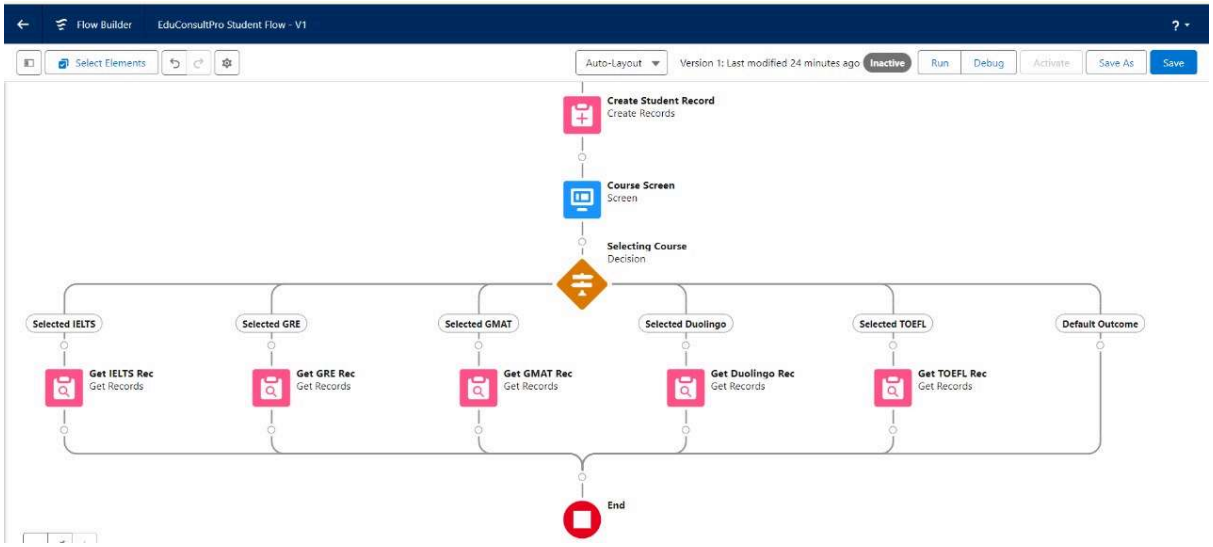
Add Condition
Sort Course Records





3.6 Create Registration Record using Create Records Element

Create Element for IELTS:

- In the Flow Builder, drag a Create Records element from the left sidebar to the canvas, placing it after the Get IELTS Rec element.
- In the Create Records Properties pane, label it as “Create IELTS Registration Rec”.

Configure the Create Element for IELTS:

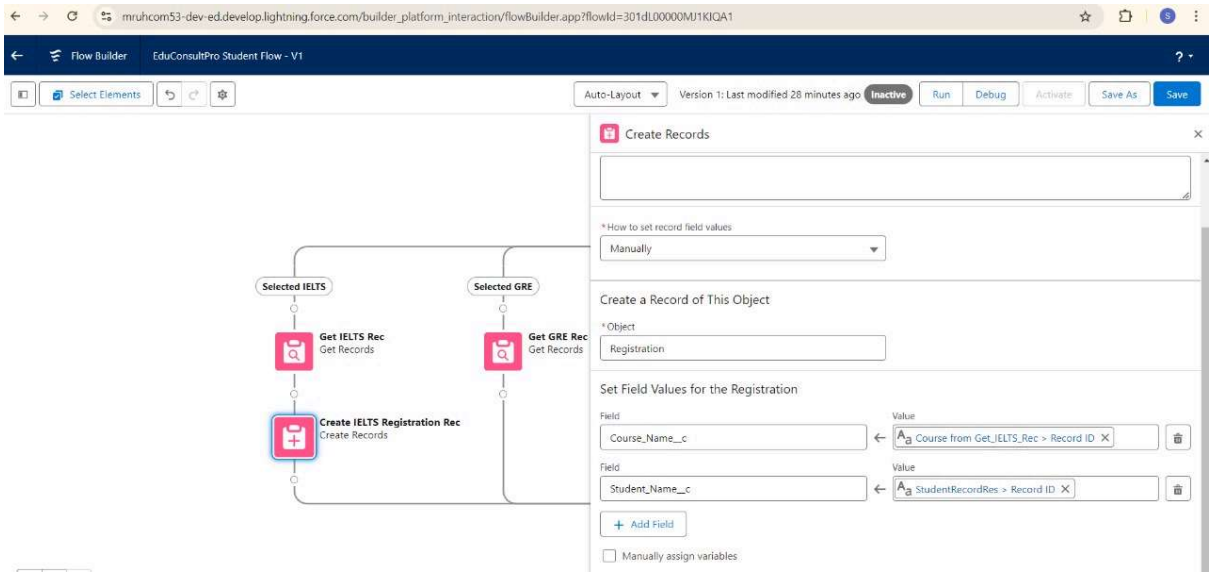
- How many records to create: One
- How to Set the Record Fields: Use separate resources, and literal values

- Object: Registration

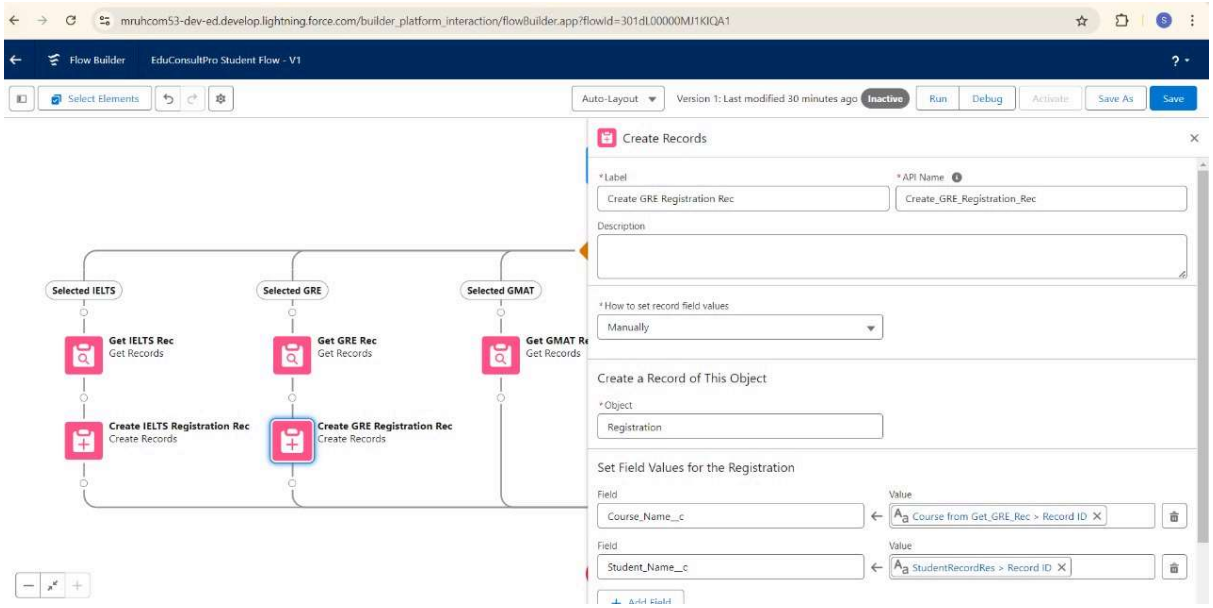
Add Fields for IELTS Registration:

- Field: Course_Name__c
  - Value: {!Get_IELTS_Rec.Id}
- Field: Student_Name__c
  - Value: {!StudentRecordRes.Id}

Click Done to complete the Create element configuration for IELTS.



Repeat the same steps for the GRE, GMAT, TOEFL, DuoLingo paths.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Get Records
Get GMAT Re
Get Records
Create IELTS Registration Rec
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Create GRE Registration Rec
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*API Name
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Manually
Create a Record of This Object
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Registration
Set Field Values for the Registration
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Value
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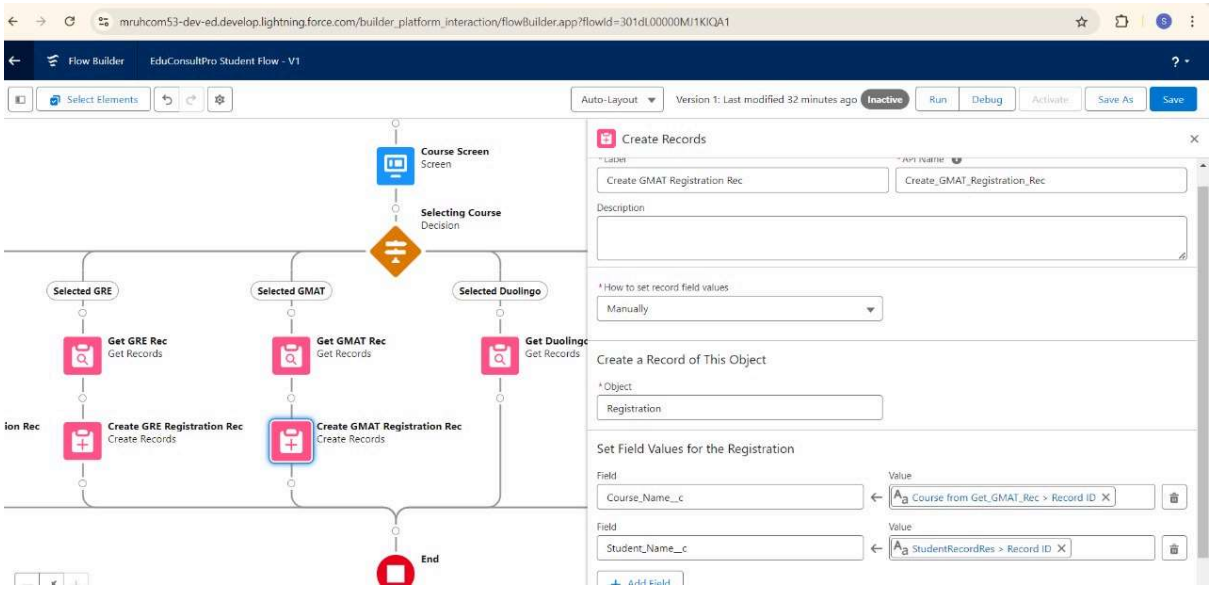
Field
Student_Name__c
Value
StudentRecordRes > Record ID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Get Records
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Get Records
Get Duolingo
Get Records
Create GRE Registration Rec
Create Records
Create GMAT Registration Rec
Create Records
End
Create Records
Create GMAT Registration Rec
Create_GMAT_Registration_Rec
Description
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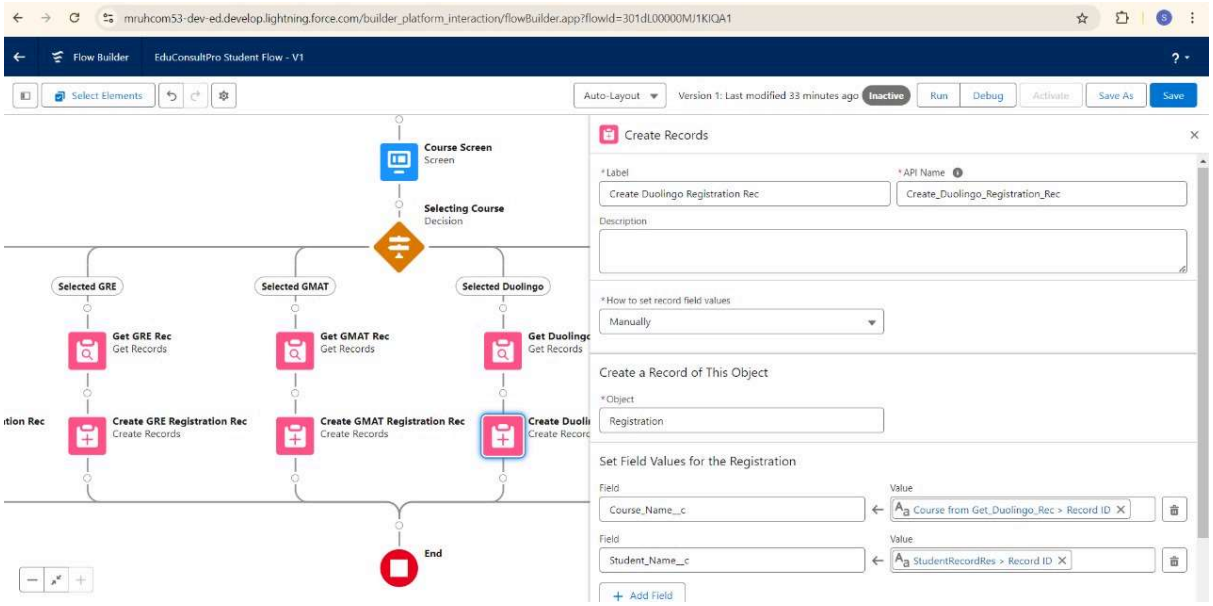
Manually
Create a Record of This Object
*Object
Registration
Set Field Values for the Registration
Field
Course_Name__c
Value
Course from Get_GMAT_Rec > Record ID
Field
Student_Name__c
Value
StudentRecordRes > Record ID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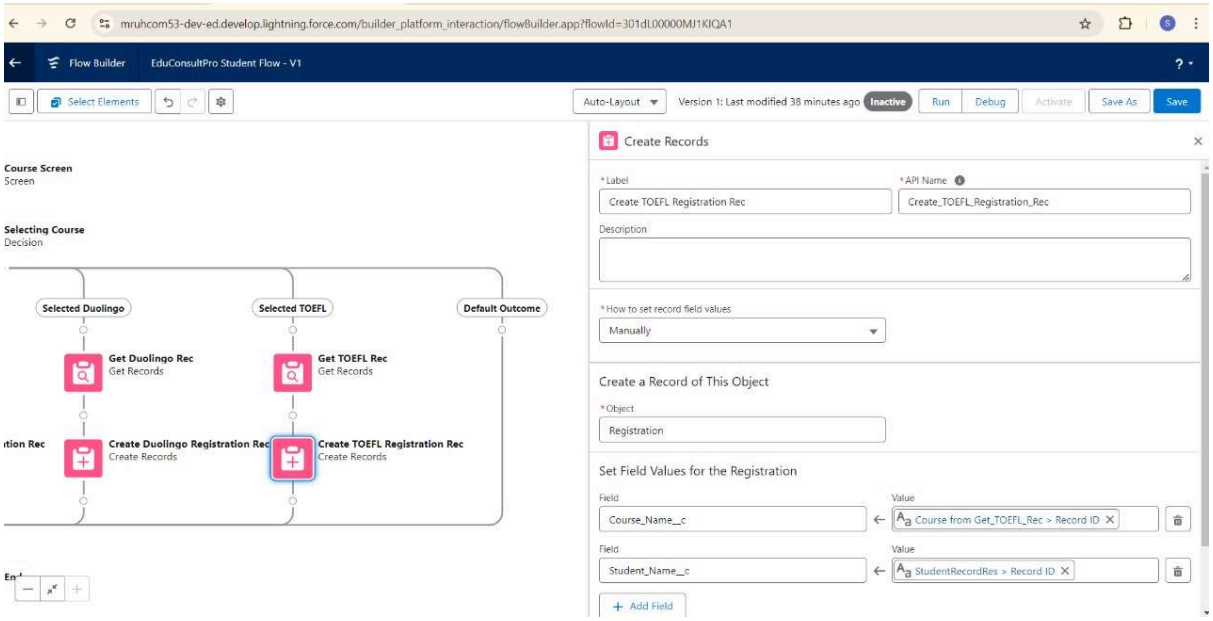
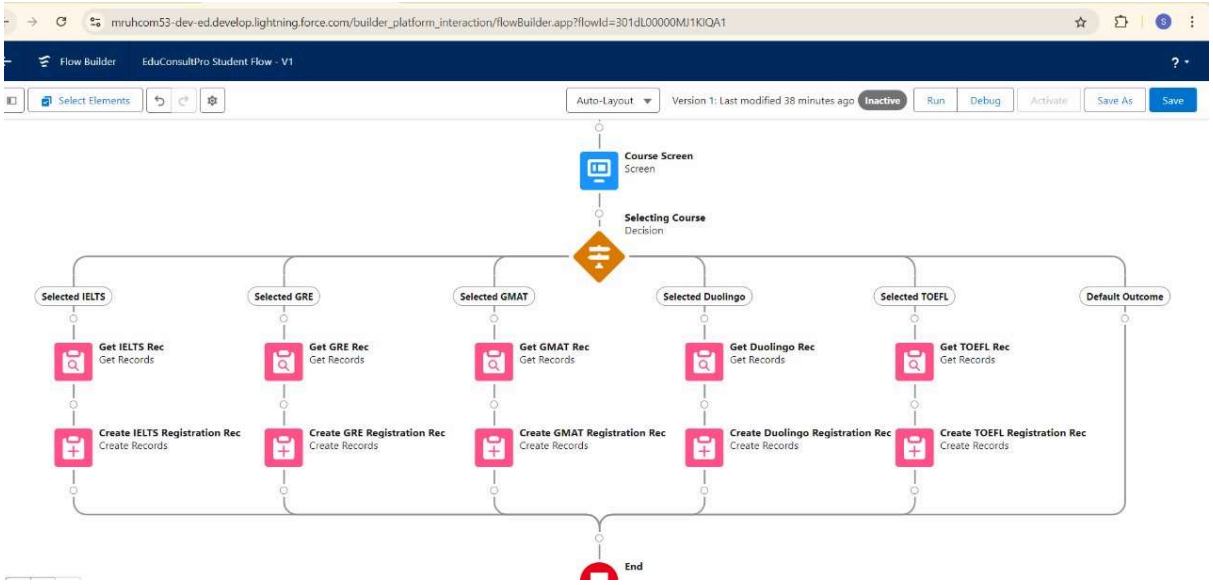
Flow Builder
EduConsultPro Student Flow - V1
Select Elements
Auto-Layout
Version 1: Last modified 33 minutes ago
Inactive
Run
Debug
Activate
Save As
Save
Course Screen
Screen
Selecting Course
Decision
Selected GRE
Selected GMAT
Selected Duolingo
Get GRE Rec
Get Records
Get GMAT Rec
Get Records
Create GRE Registration Rec
Create Records
Create GMAT Registration Rec
Create Records
End
Create Records
*Label
Create Duolingo Registration Rec
*API Name
Create_Duolingo_Registration_Rec
Description
*How to set record field values
Manually
Create a Record of This Object
*Object
Registration
Set Field Values for the Registration
Field
Course_Name__c
Value
Course from Get_Duolingo_Rec > Record ID
Field
Student_Name__c
Value
StudentRecordRes > Record ID
Add Field


mruhcom53-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowBuilder.app?flowId=301dL00000MJ1KIQA1
Flow Builder
EduConsultPro Student Flow - V1
Select Elements
Auto-Layout
Version 1: Last modified 38 minutes ago
Inactive
Run
Debug
Activate
Save As
Save
Course Screen
Screen
Selecting Course
Decision
Selected Duolingo
Selected TOEFL
Default Outcome
Get Duolingo Rec
Get Records
Get TOEFL Rec
Get Records
Create Duolingo Registration Rec
Create Records
Create TOEFL Registration Rec
Create Records
Create Records
*Label
Create TOEFL Registration Rec
*API Name
Create_TOEFL_Registration_Rec
Description
*How to set record field values
Manually
Create a Record of This Object
*Object
Registration
Set Field Values for the Registration
Field
Course_Name__c
Value
Course from Get_TOEFL_Rec > Record ID
Field
Student_Name__c
Value
StudentRecordRes > Record ID
Add Field



3.7 Creating Email Text Template Variables for email body and subject

Create a New Resource:

- In the Flow Builder, click on the Toggle Toolbox on the left corner.
- Click New Resource.
- Select Text Template as the Resource Type.

Configure the Text Template:

- API Name:StuRegistrationEmailTextTempBody
- Select View:View as Plain Text

Enter the Text:

Paste the following text into the 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.

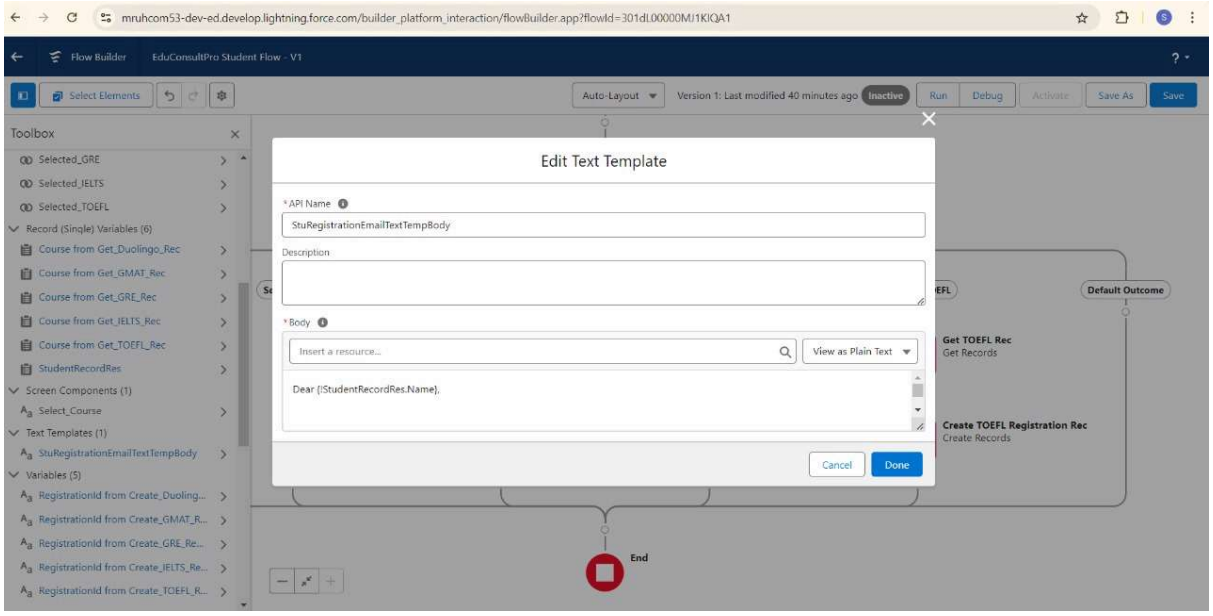
Once again, congratulations on taking this important step towards realizing your academic and career aspirations. We are thrilled to have you as part of the EduConsultantPro family and look forward to supporting you on your journey to success.

If you have any questions or need assistance, please don't hesitate to contact us.

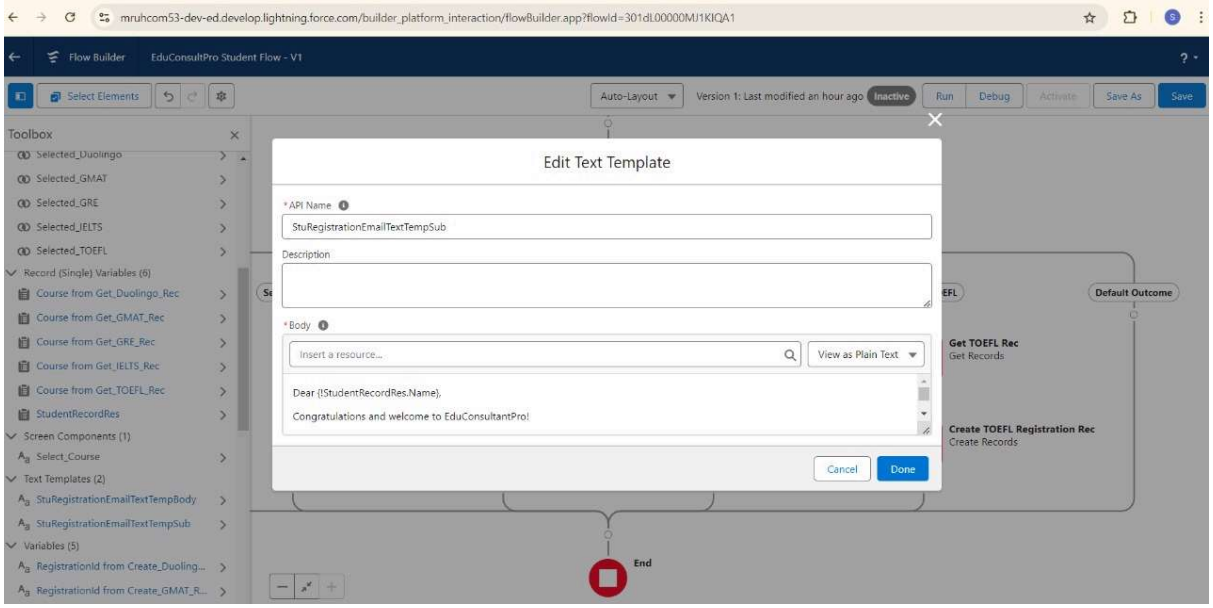
Thank you.

Click Done:

- After entering the text, click Done to save the Text Template.



Repeat same steps to create an email text template for the email subject, label it as "StuRegistrationEmailTextTempSub", write a text message in the body and save it.



3.8 Add an Action Element

- In the Flow Builder, drag an Action element from the left sidebar to 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".

Configure the Action Element:

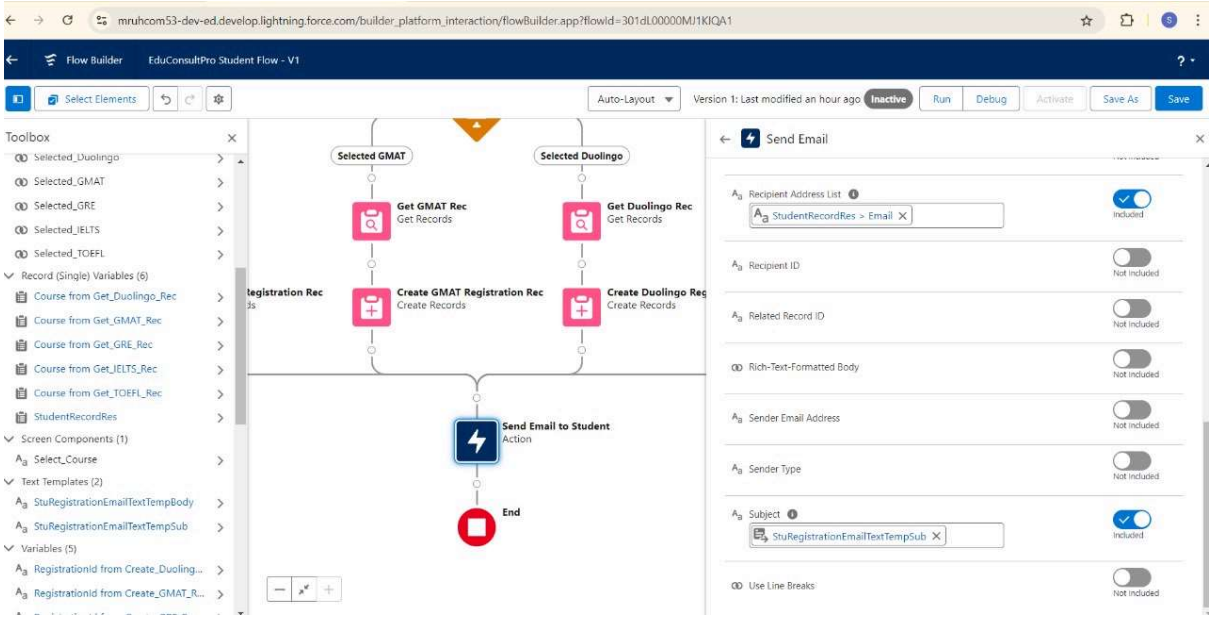
- Action Type: Select Send Email (or the appropriate email action available in your Salesforce instance).

Set Input Values:

- Body:
  - Set the input value to {!StuRegistrationEmailTextTempBody} (the Text Template you created earlier).
- Recipient Address List:
  - Set the input value to {!StudentRecordRes.Email__c} (the email address of the student).
- Subject:
  - Set the input value to {!StuRegistrationEmailTextTempSub} (you'll need to create or specify this variable if it's not already created).

Click Done:

- After setting the input values, click Done to complete the Action element configuration.



3.9 Add Screen Element

- In the Flow Builder, drag a Screen element from the left sidebar to the canvas, placing it after the Send Email to Student Action element.
- In the Screen Properties pane, label it as “Success Screen”.

Add Display Text Component:

- From the left sidebar, search for the Display Text component.
- Drag the Display Text component to the Success Screen panel.

Configure the Display Text Component:

- Label: Set the label to “SuccessMessage”.
- Text: Paste the following text into the Resource Picker box:

Dear {!StudentRecordRes.Name},

Congratulations and welcome to EduConsultantPro!

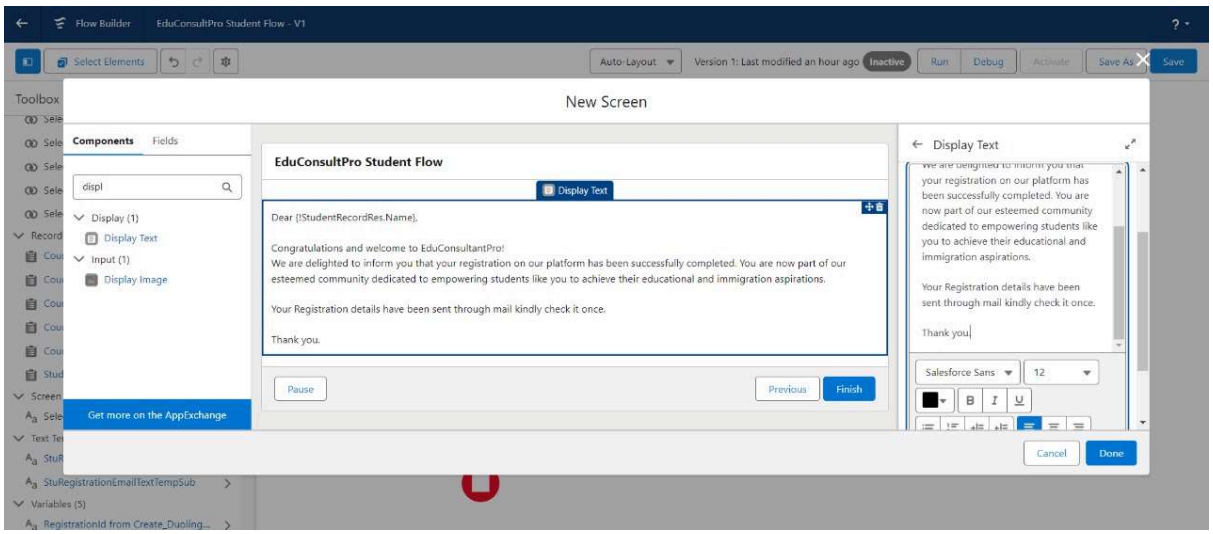
We are delighted to inform you that your registration on our platform has been successfully completed. You are now part of our esteemed community dedicated to empowering students like you to achieve their educational and immigration aspirations.

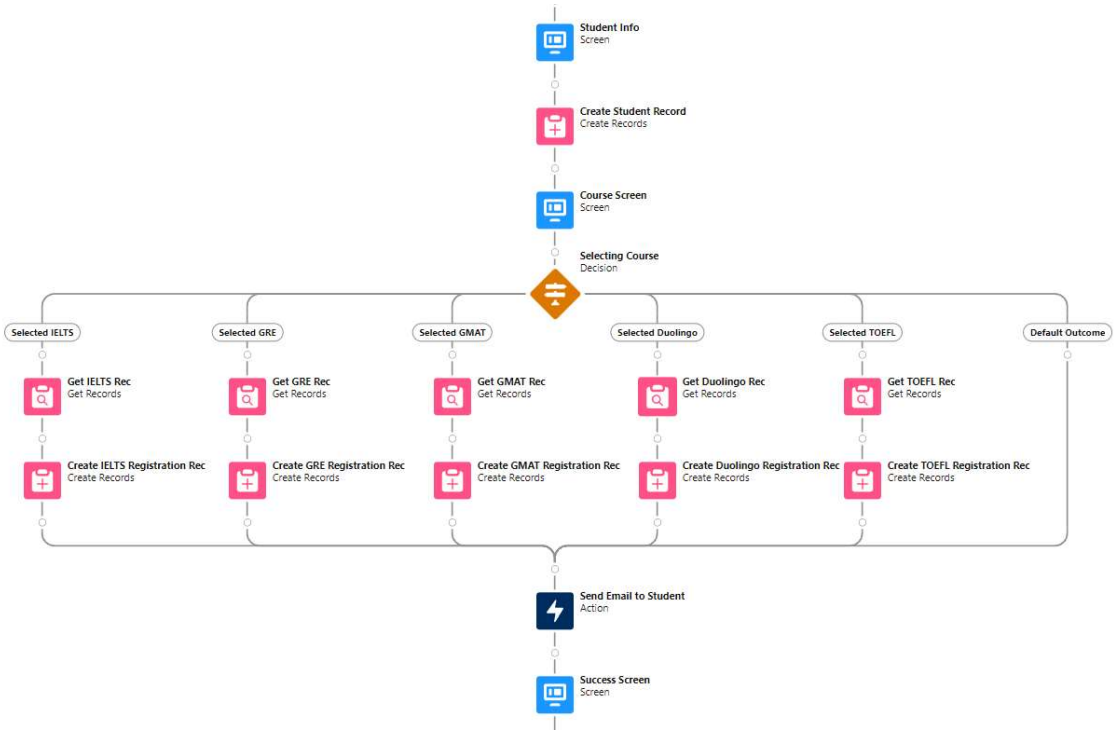
Your registration details have been sent through mail; kindly check it once.

Thank you.

Click Done:

- After entering the text, click Done to complete the configuration of the Success Screen.


Flow Builder
EduConsultPro Student Flow - V1
Select Elements
Auto-Layout
Version 1: Last modified an hour ago
Inactive
Run
Debug
Activate
Save As
Save
Toolbox
New Screen
Components
Fields
displ
Display (1)
Display Text
Input (1)
Display Image
Get more on the AppExchange
EduConsultPro Student Flow
Display Text
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.
Pause
Previous
Finish
Display Text
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
Salesforce Sans
12
Cancel
Done
Variables (5)


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
Get TOEFL Rec
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

4. Create Users

4.1 User

Navigate to User Creation:

- Go to Setup (click the gear icon in the top right corner).
- Under Administration, select Users.
- Click on New User.

Enter User Details:

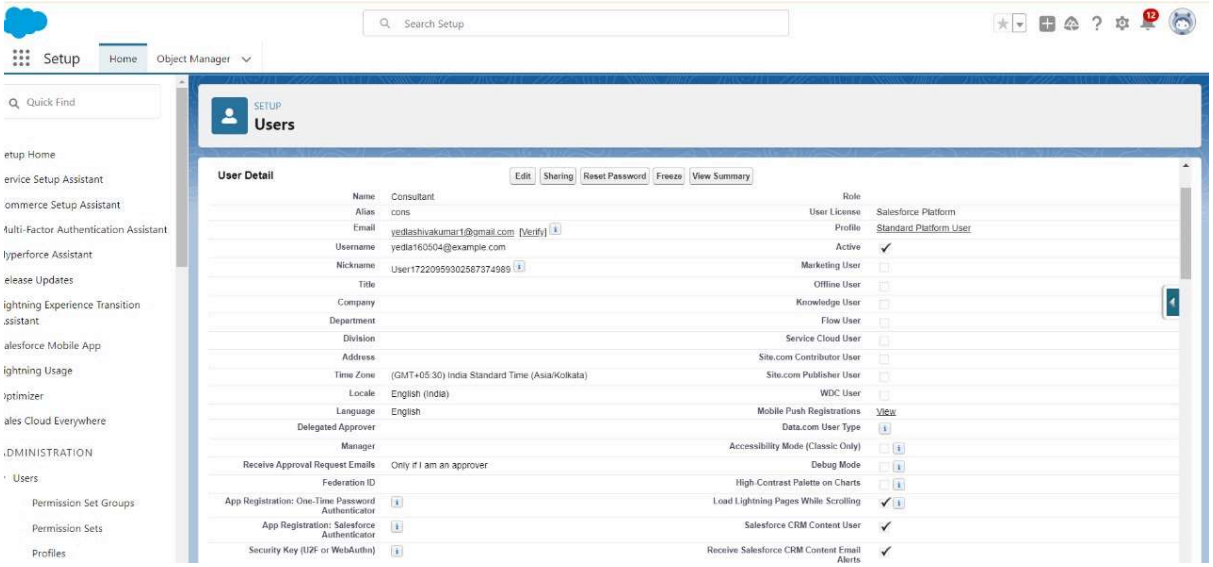
- Last Name: Enter Consultant.
- License: Select Salesforce Platform.
- Profile: Select Standard Platform User.

Fill in Mandatory Fields:

- Complete all other mandatory fields (e.g., First Name, Email, Username, etc.) as required for user creation.

Save the User:

- Click Save to create the new user.



4.2 Configure the User Settings

Navigate to User Settings:

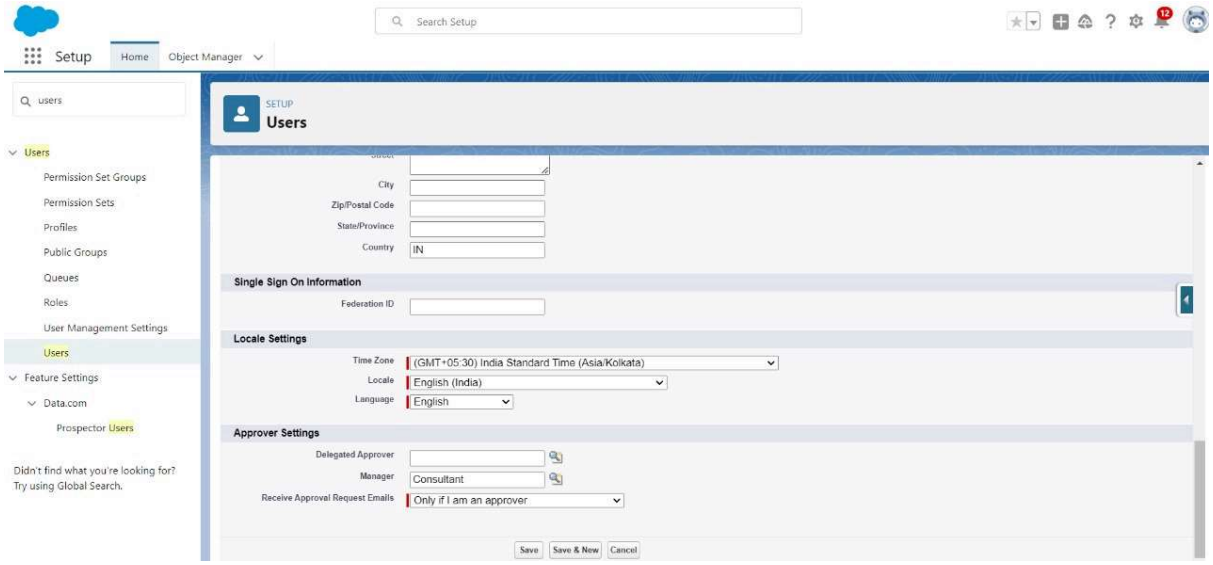
- Go to Setup (click the gear icon in the top right corner).
- Under Administration, select Users.
- Find your user record and click Edit next to your name.

Update Approver Settings:

- Scroll down to the Approver Settings section.
- In the Manager field, select Consultant from the dropdown list.

Save Changes:

- Click Save to apply the changes.

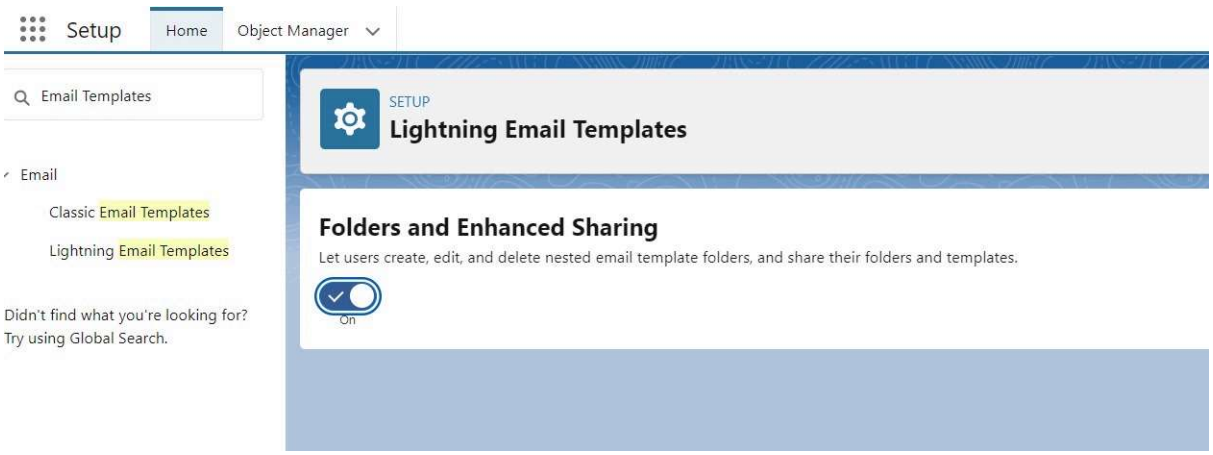


5.Create an Approval Process for Property Object

5.1 Create an Email Template

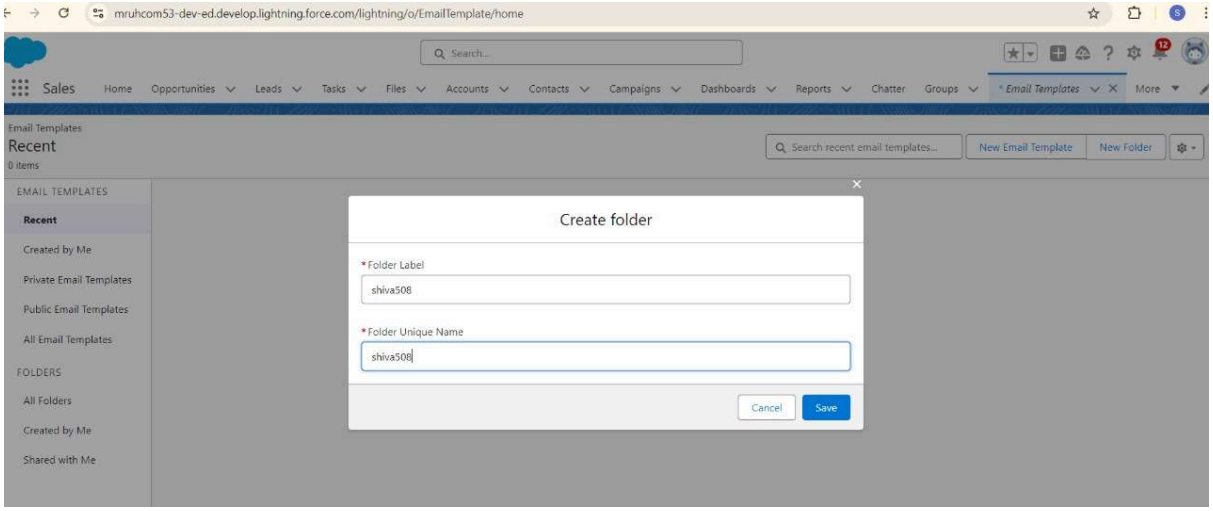
Enable Lightning Email Templates:

- Go to Setup (click the gear icon in the top right corner).
- Enter Templates in the Quick Find box.
- Select Lightning Email Templates.
- Toggle it on if it's not already enabled.



Create a New Folder for Templates:

- Go to the App Launcher (grid icon in the top left corner).
- Search for “Email Templates” and select it.
- Click New Folder.
- Enter a desired name for the folder and click Save.



Create a New Email Template:

- In the Email Templates section, click New Email Template.
- Select the folder you created in the previous steps.
-

Configure the Email Template:

- Email Template Name: Enter "Submission Template".
- HTML Value: Paste the following 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.

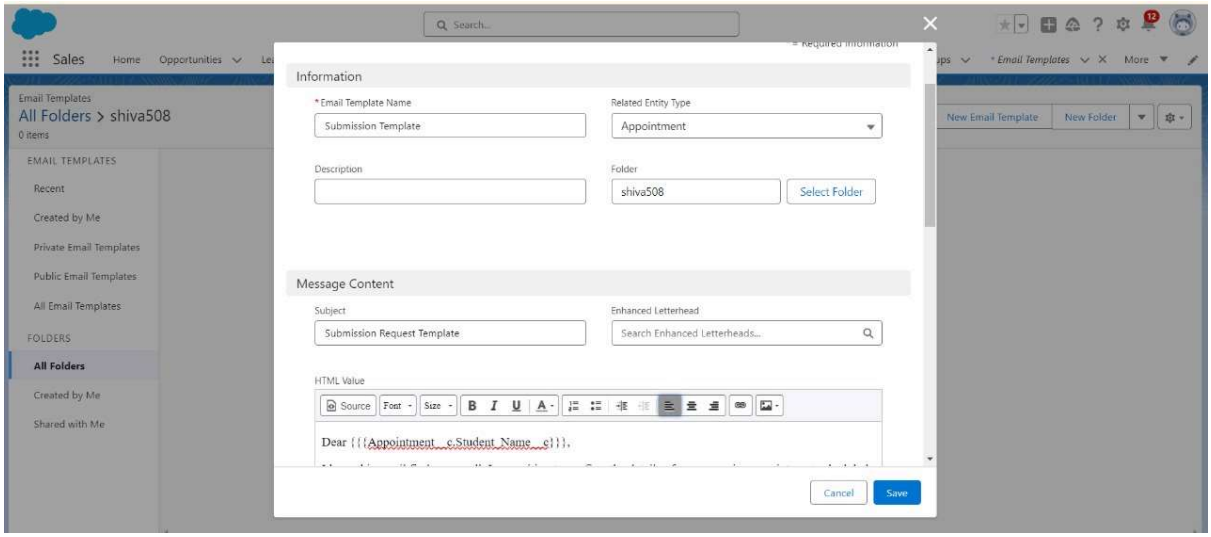
Looking forward to our meeting.

Best regards,

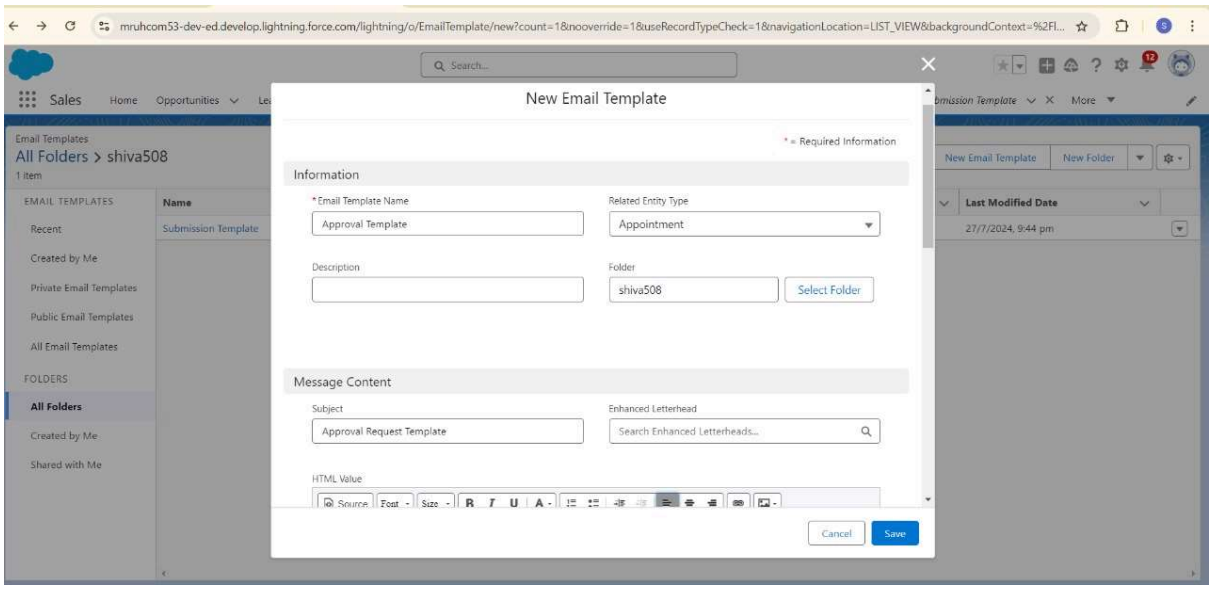
{{{Recipient.Name}}},

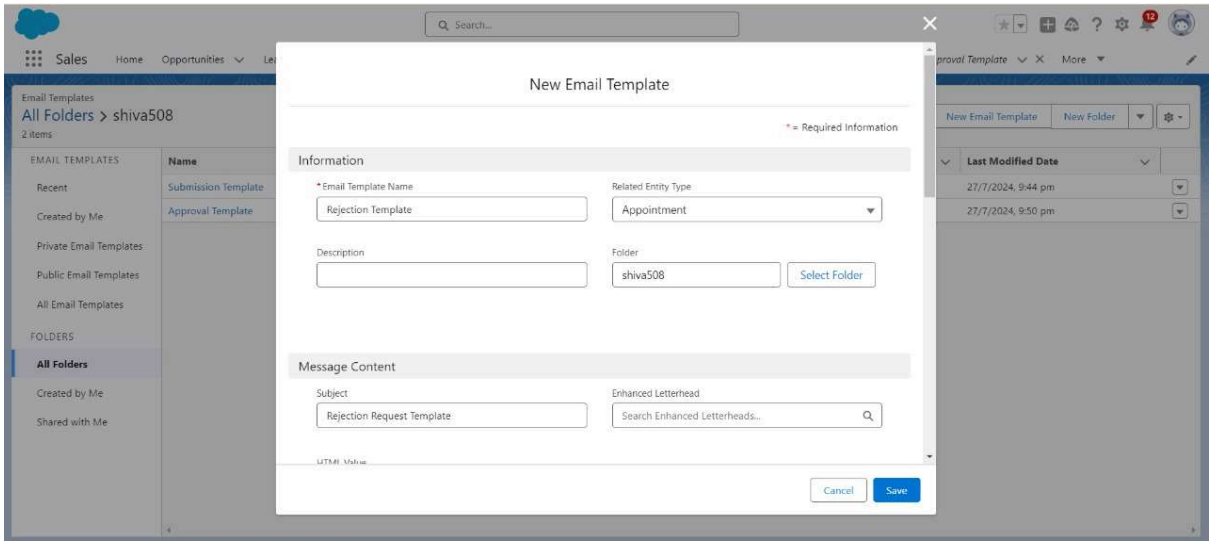
EduConsultantPro

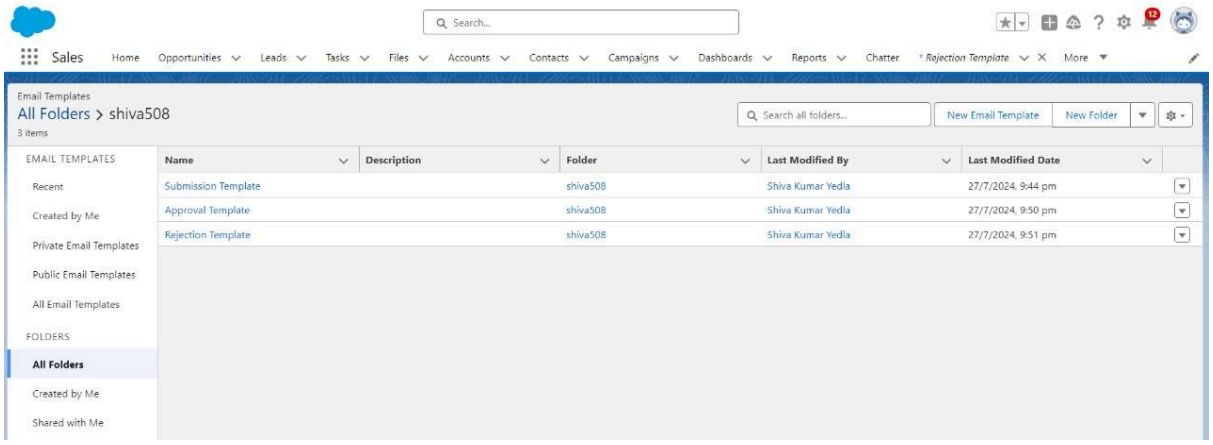
Save the Email Template:

- Click Save to complete the creation of the email template.
- 

Create two more Email templates for Approval and Rejection of Request similar to the previous one.







5.2 Create an Approval Process

Navigate to Approval Processes:

- Go to Setup (click the gear icon in the top right corner).
- Enter Approval in the Quick Find box.
- Select Approval Processes.

Select the Object:

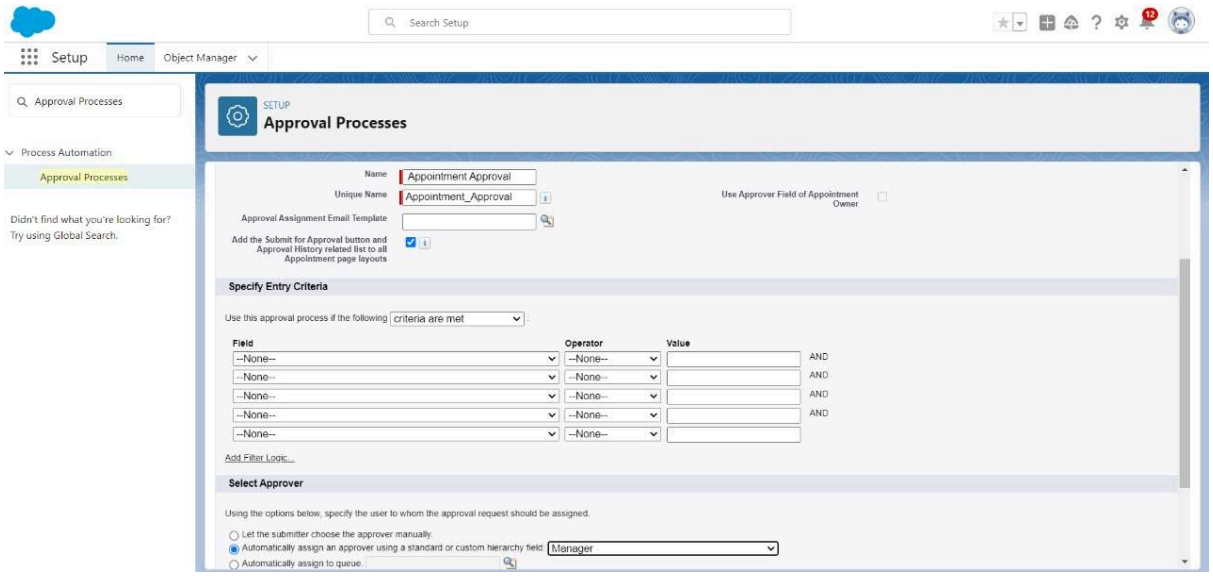
- In Manage Approval Processes For, select Appointment.

Create a New Approval Process:

- Click Create New Approval Process.
- Choose Use Jump Start Wizard.

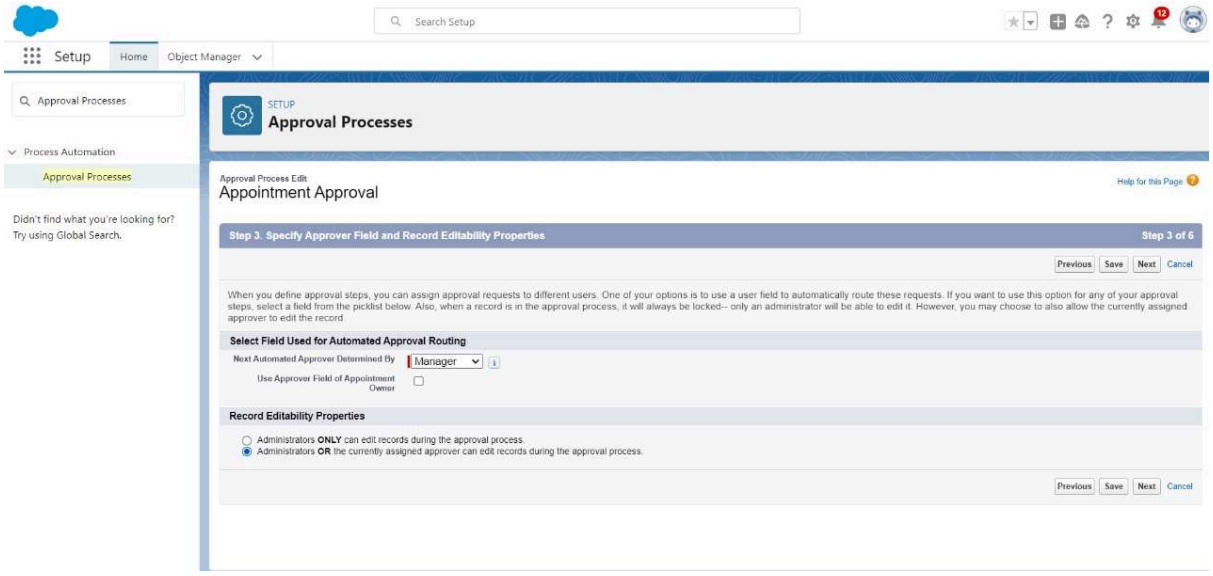
Configure the Approval Process:

- Process Name: Enter Appointment Approval.
- Select Approver: For the option “Automatically assign an approver using a standard or custom hierarchy field”, select Manager.
- Click Next and then Next on Automated Approver Determined By. Select Manager.



Set Record Editability Properties:

- Under Record Editability Properties, choose Administrators OR the currently assigned approver can edit records during the approval process.
- Click Save to save the approval process.

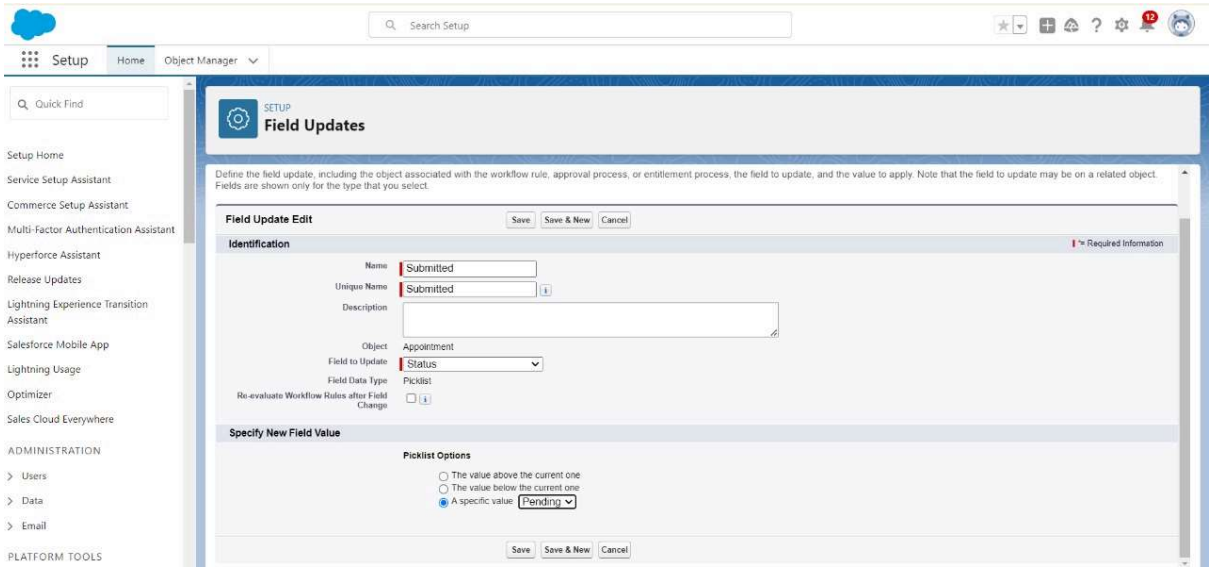


View Approval Process Details:

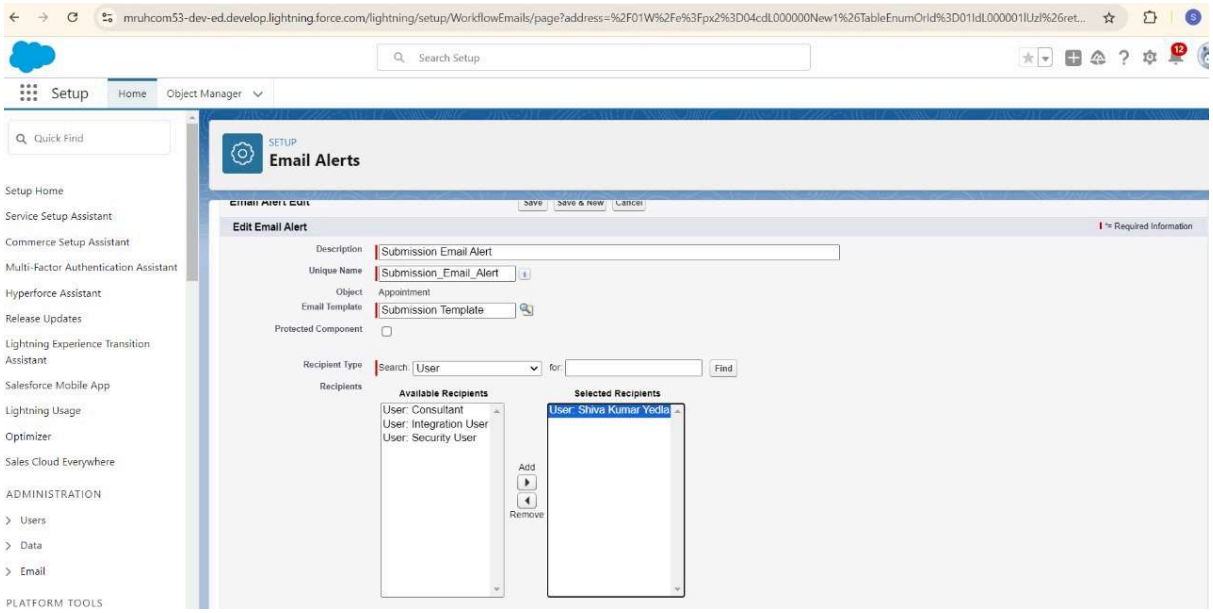
- Click View Approval Process Detail Page.

Configure Initial Submission Actions:

- Under Initial Submission Actions, click Add New.
    - Field Update:
        - Name: Enter Submitted.
        - Field to Update: Select Appointment: Status.
        - A Specific value: Enter Pending.

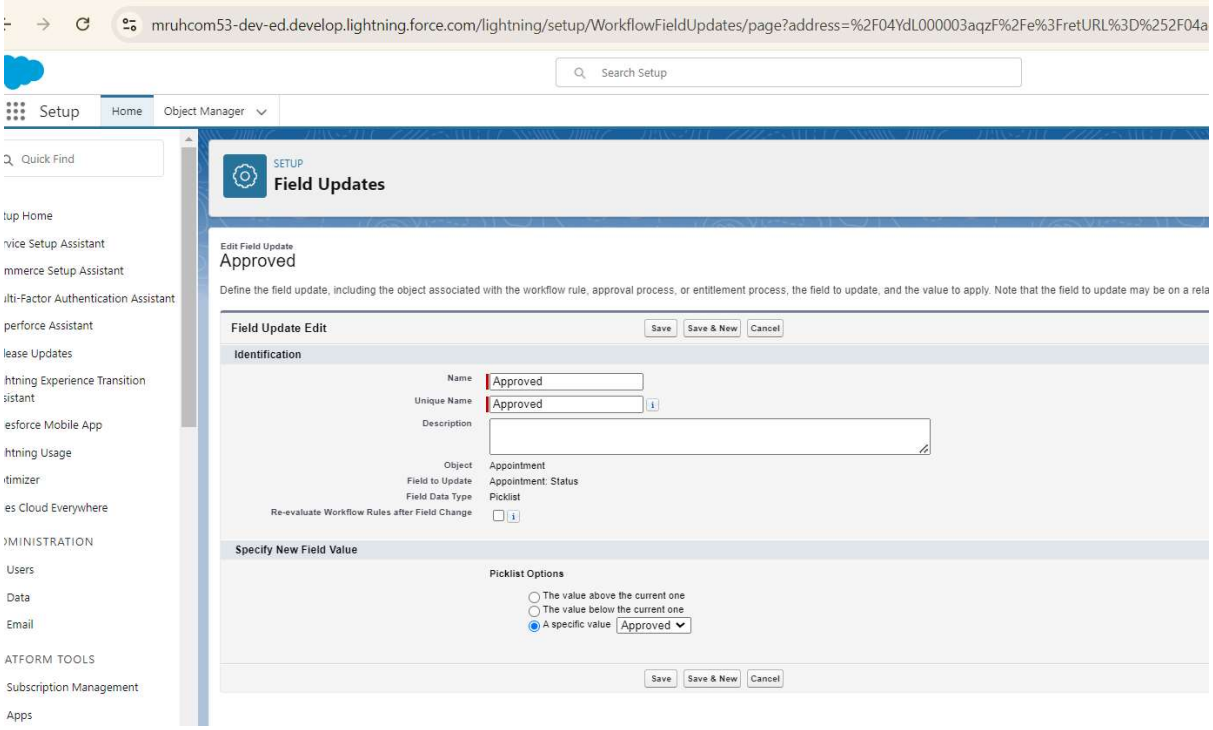


- Click Add New again.
    - Email Alert:
        - Description: Enter Submission Email Alert.
        - Unique Name: Auto-populates.
        - Email Template: Select Submission Template.
        - Recipient Type: Select Your Name.

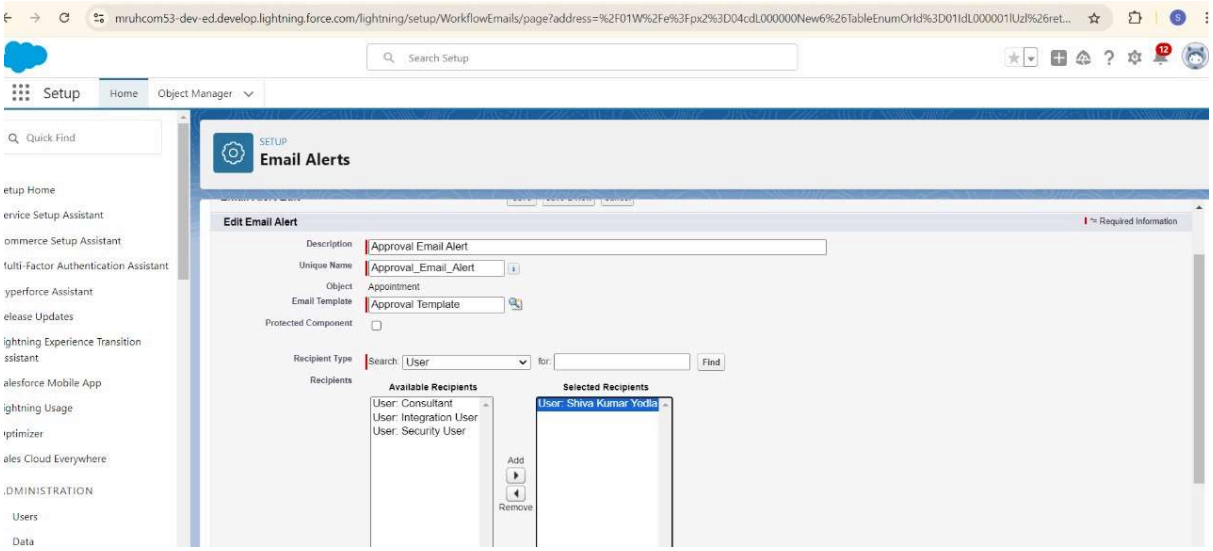


Configure Final Approval Actions:

- Go to the Approval Process Detail Page.
- Under Final Approval Actions, click Add New.
    - Field Update:
        - Name: Enter Approved.
        - Field to Update: Select Appointment: Status.
        - A Specific value: Enter Approved.



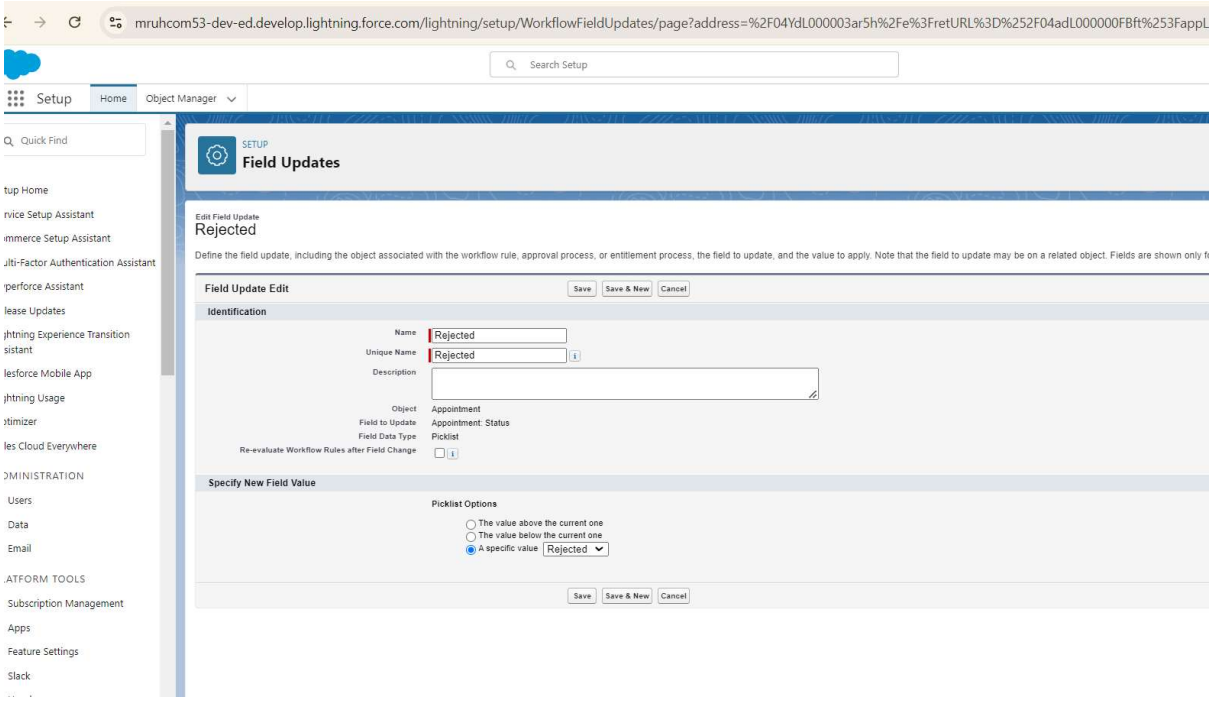
- Email Alert:
    - Description: Enter Approval Confirmation Email Alert.
    - Unique Name: Auto-populates.
    - Email Template: Select Approval Template
    - Recipient Type: Select Your Name.



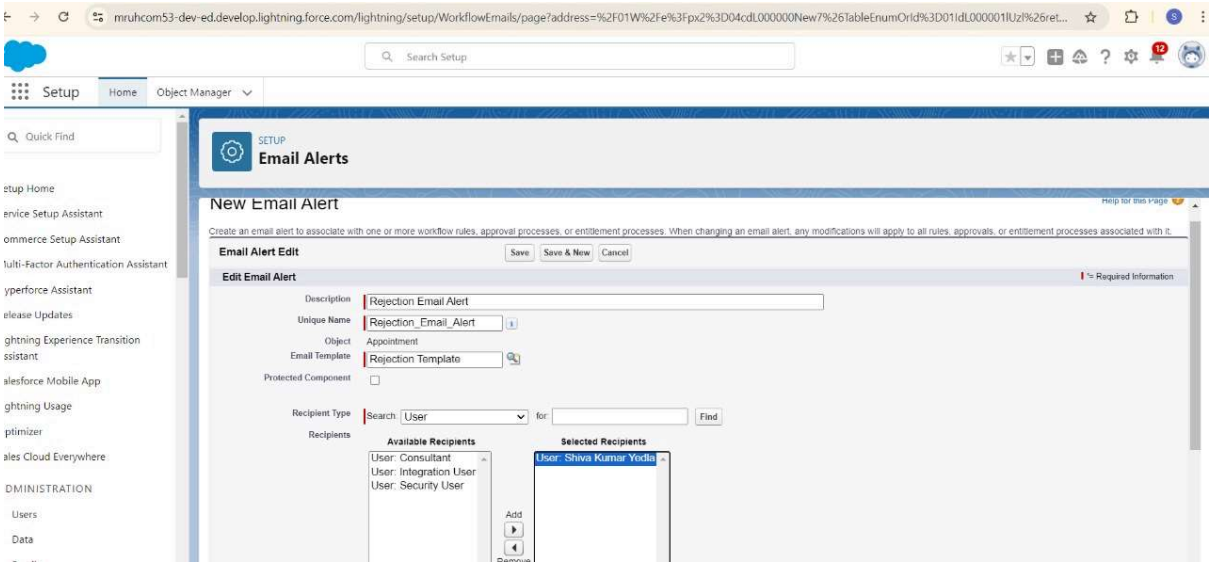
- Click Save to save the final approval actions.

Configure Final Rejection Actions:

- Still on the Approval Process Detail Page, under Final Rejection Actions, click Add New.
    - Field Update:
        - Name: Enter Rejected.
        - Field to Update: Select Appointment: Status.
        - A Specific value: Enter Rejected.



- Email Alert:
  - Description: Enter Rejection Notification Email Alert.
  - Unique Name: Auto-populates.
  - Email Template: Select Rejection Template
  - Recipient Type: Select Your Name.



- Click Save to save the final rejection actions.

6. Create a Record Triggered Flow

6.1 Configure the Start Element

Navigate to Flows:

- Go to Setup (click the gear icon in the top right corner).
- Enter Flows in the Quick Find box and select Flows.

Create a New Flow:

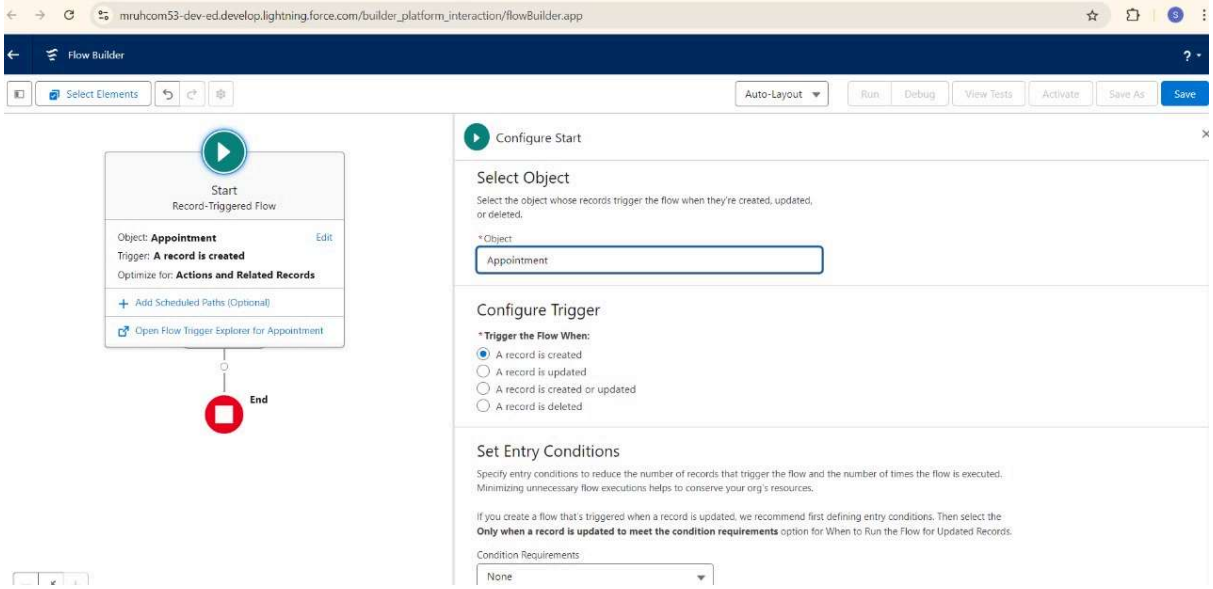
- Click New Flow.
- Select Record-Triggered Flow from the options.
- Click Create.

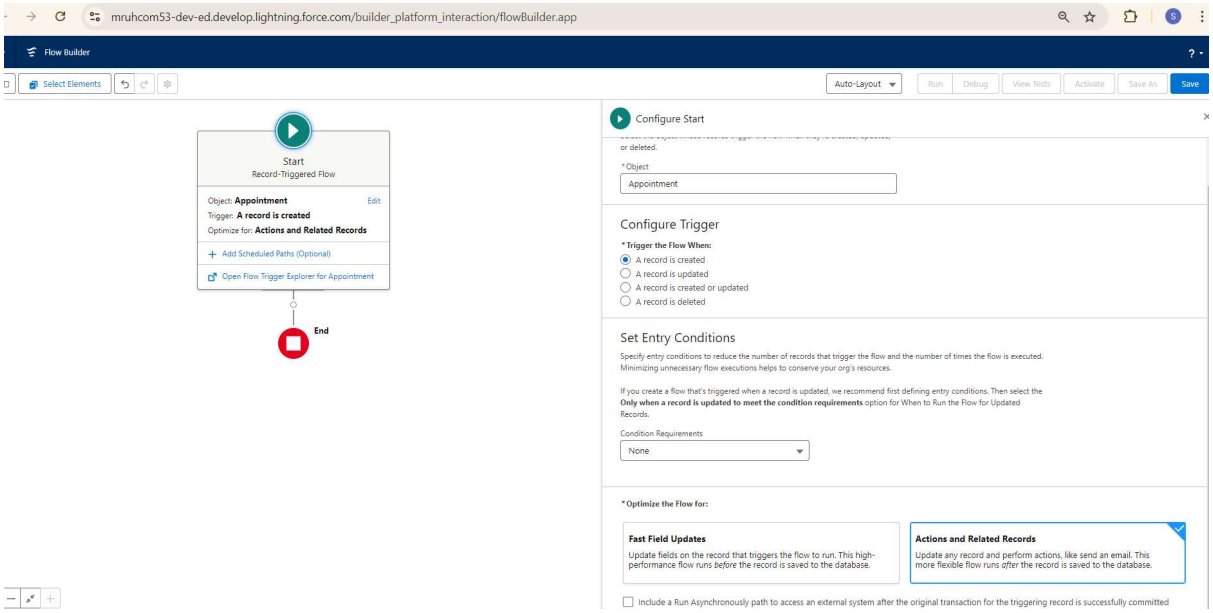
Configure the Start Element:

- The Configure Start window opens.
  - Object: Select Appointment from the dropdown list.
  - Trigger the Flow When: Choose A record is created.
- The flow configuration should now display the selected object and trigger criteria.

Click Done:

- After configuring the Start element, click Done to proceed





6.2 Add an Action Element

In the Flow Builder, drag an Action element from the left sidebar to the canvas, placing it after the Start element.

Configure the Action Element:

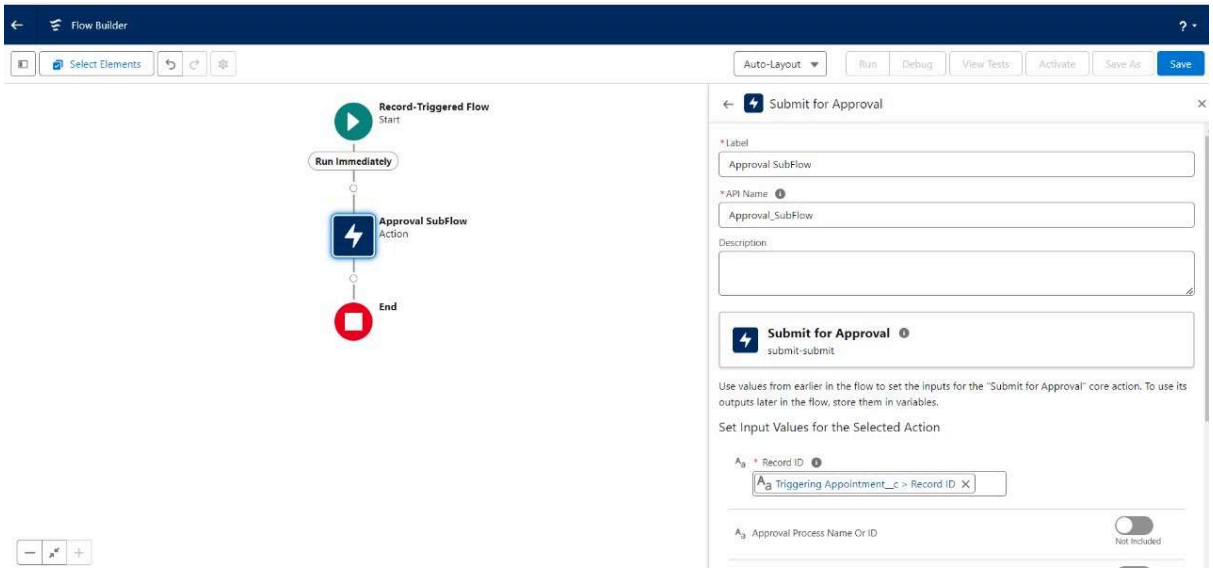
- Click on the Action element to configure it.
- Action Type: Select Submit for Approval from the action types.
- Label: Enter Approval SubFlow.

Set RecordId:

- In the RecordId field, set the value to {!$Record.Id}. This will use the ID of the record that triggered the flow.

Save and Activate the Flow:

- Click Save to save your flow.
- Flow Name: Enter EduConsultPro Approval Flow.
- Click Activate to make the flow live.



7. Creating a ScreenFlow for Existing Student to Book an Appointment

7.1 Add Screen Element

Navigate to Flow Builder:

- Go to Setup (click the gear icon in the top right corner).
- Enter Flow Builder in the Quick Find box and select Flow Builder.

Create a New Flow:

- Click New Flow.
- Select Screen Flow from the flow types.
- Click Create.

Add a Screen Element:

- Drag a Screen element from the left sidebar to the canvas.

Configure the Screen Element:

- Click on the Screen element to configure it.
- Label: Enter Get Student Info.

Add Text Components:

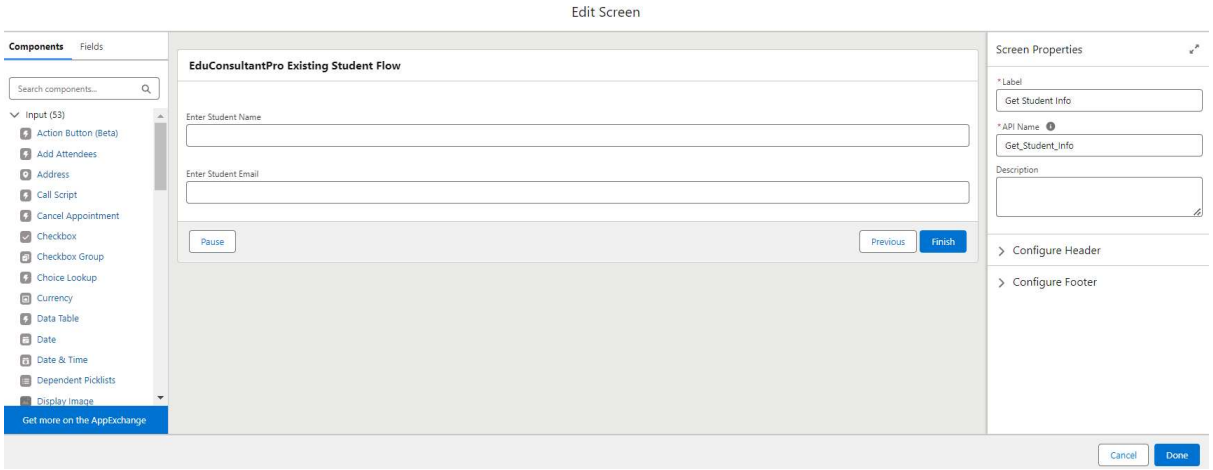
- From the left sidebar, drag and drop two Text components onto the screen element.

Configure Text Components:

- First Text Component:
  - Label: Enter Enter Student Name.
- Second Text Component:
  - Label: Enter Enter Student Email.

Complete Configuration:

- Click Done to finalize the screen configuration.



7.2 Add GET Record Element

- Drag a Get Records element from the left sidebar to the canvas, placing it after the Screen element.

Configure the Get Record Element:

- Label: Enter Get Rec.
- Object: Select Student from the dropdown list.
- Condition Requirements: Choose All Conditions are Met (AND).

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.

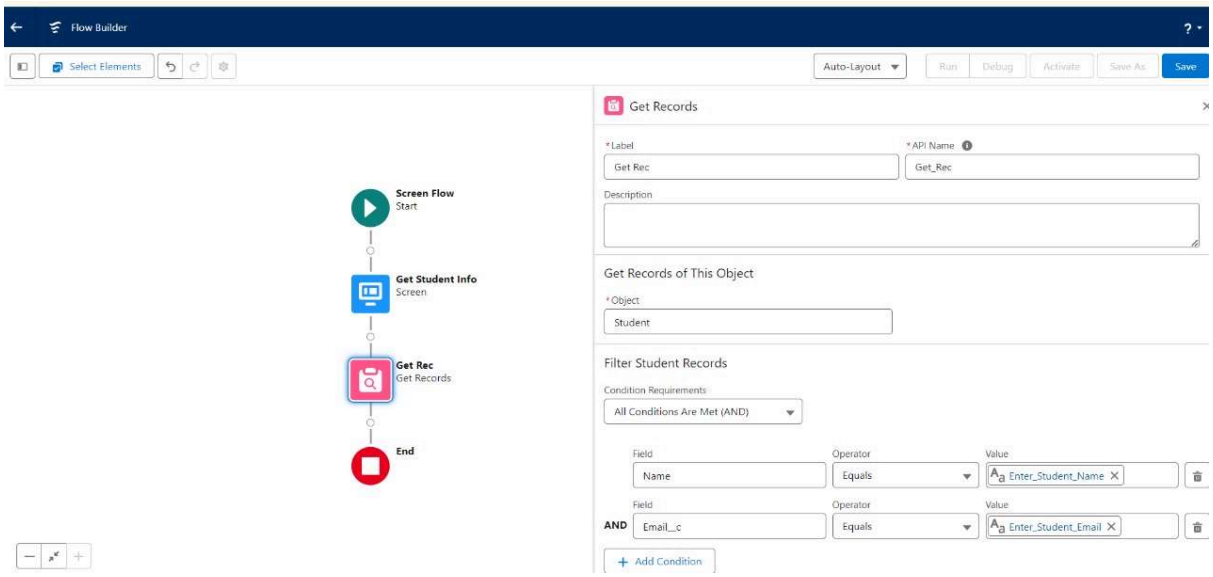
- Value: Set to {!Enter_Student_Email} (from the screen component).

Configure Record Output:

- How Many Records to Store: Select Only the first record if you expect a single match.
- Store Record Data: Choose to store the record's fields in a variable or use directly in your flow as needed.

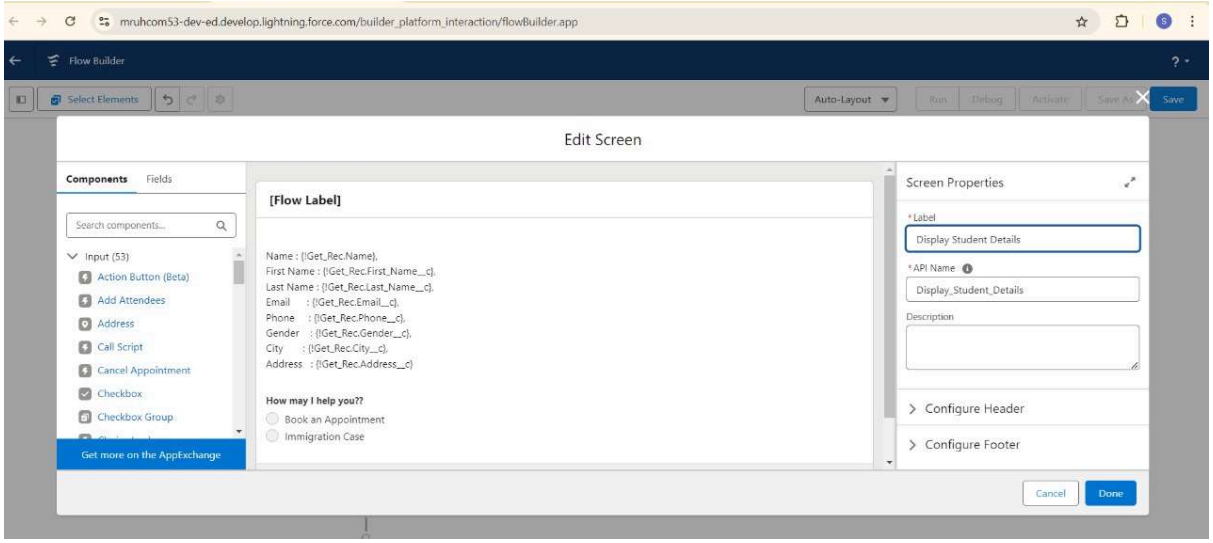
Save the Get Record Element:

- Click Done to save the Get Record configuration.



7.3 Add Decision Element

Add a Screen element with label as "Display Student Details" and the following fields.



Add a Decision Element:

- Drag a Decision element from the left sidebar to the canvas, placing it after the Display Student Details element.

Configure the Decision Element:

- Label: Enter Appointment or Case.

Define the Outcome for Appointment:

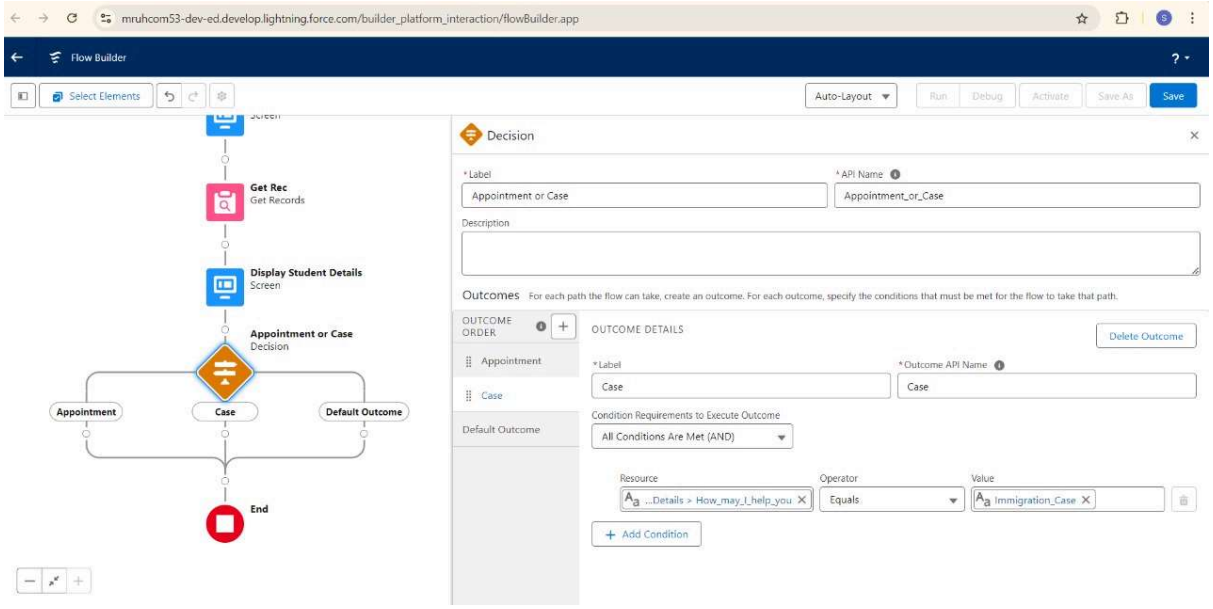
- Outcome Label: Enter Appointment.
- Resource: Select {!How_may_I_Help_you} (this is the variable capturing the user's selection).
- Operator: Choose Equals.
- Value: Enter {!Book_an_Appointment} (this is the value for booking an appointment).

Add Additional Outcomes for Case Options:

- Click on 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} (this is the value for raising a case).

Save the Decision Element:

- Click Done to save the Decision configuration.



7.4 Add Screen Element

Drag a Screen element from the left sidebar to the canvas, placing it after the Decision element on the Appointment path.

Configure the Screen Element:

- Label: Enter Appointment Booking Screen.

Add Fields to the Screen:

- Click on Fields in the left panel.
- Click on the Record Variable Input and create a new resource.

Create a New Resource:

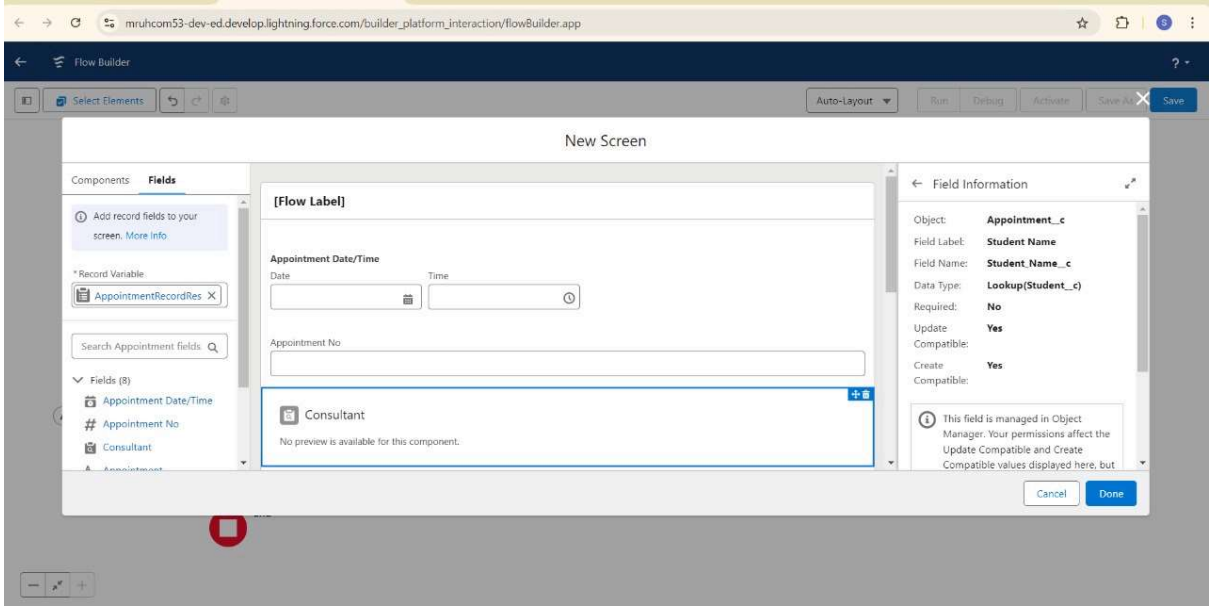
- Resource Type: Select Variable.
- API Name: Enter AppointmentRecordRes.
- Data Type: Select Record.
- Object: Select Appointment.
- Click Done to create the resource.

Add Fields from the Appointment Object:

- Drag the required fields from the Appointment object to the screen to collect necessary information. This could include fields such as:
  - Appointment Date
  - Appointment Time
  - Purpose
  - Consultant
  - Student Name

Complete the Configuration:

- After adding all necessary fields, click Done to save the screen configuration.



7.5 Add GET Record Element

Drag a Get Records element from the left sidebar to the canvas, placing it after the Appointment Booking Screen element on the Appointment path.

Configure the Get Records Element:

- Label: Enter Get Consultant Rec.

Select Object:

- Object: Select Consultant from the dropdown list.

Define the Condition Requirements:

- Condition Requirements: Choose All Conditions are Met (AND).

Define the Conditions:

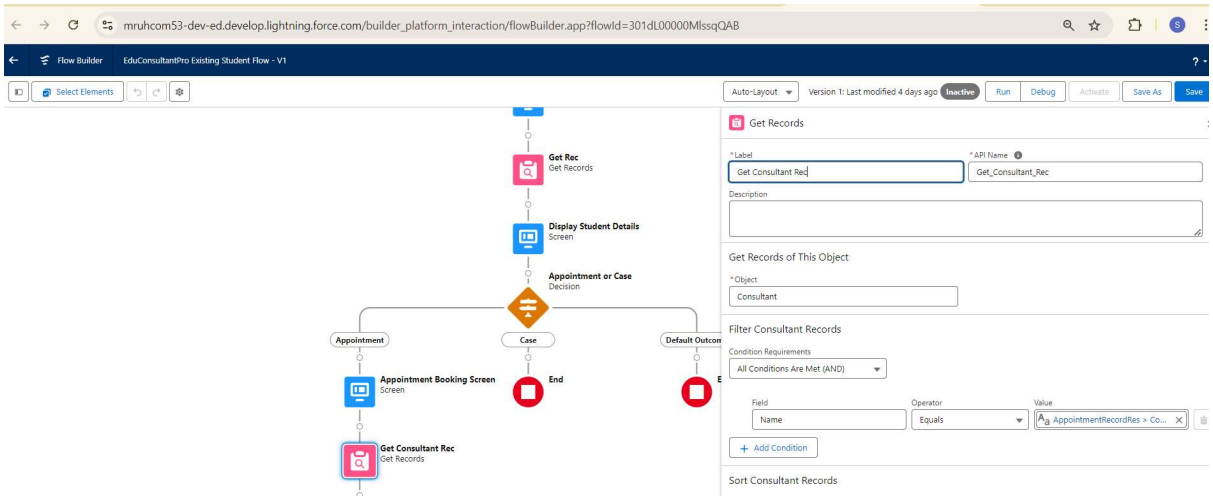
- Field: Select Name.
  - Operator: Choose Equals.
  - Value: Set to {!AppointmentRecordRes.Consultant_Name__c} (this will be the field capturing the consultant's name from the appointment record).

Configure Record Output:

- How Many Records to Store: Select Only the first record if you expect a single match.
- Store Record Data: Choose to store the record's fields in a variable or use them directly in your flow as needed.

Save the Get Records Element:

- Click Done to save the Get Records configuration.



7.6 Creating Appointment Record using Create Records Element

- Drag a Create Records element from the left sidebar to the canvas, placing it after the Get Consultant Rec element.

Configure the Create Records Element:

- Label: Enter Create Appointment.

Set How Many Records to Create:

- How Many Records to Create: Select One.

Set How to Set the Record Fields:

- How to Set the Record Fields: Select Use separate resources, and literal values.

Select Object:

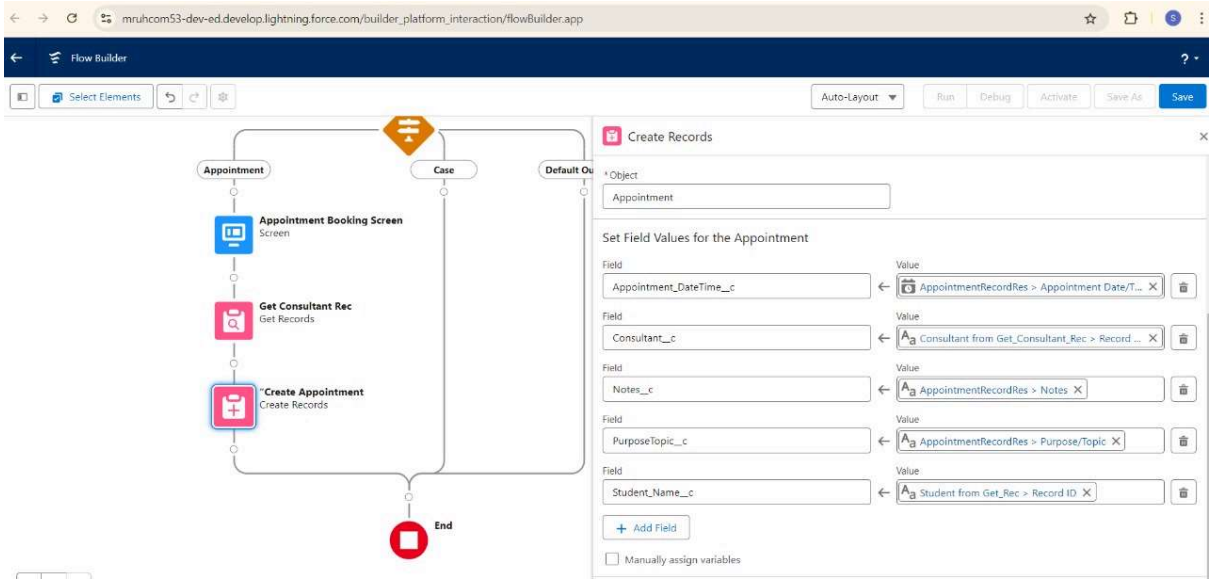
- Object: Select Appointment.

Map the Fields:

- Field:Appointment_DateTime__c
  - Value:{!AppointmentRecordRes.Appointment_DateTime__c}
- Field:Consultant__c
  - Value:{!Get_Consultant_Rec.Id}
- Field:Notes__c
  - Value:{!AppointmentRecordRes.Notes__c}
- Field:PurposeTopic__c
  - Value:{!AppointmentRecordRes.PurposeTopic__c}
- Field:Student_Name__c
  - Value:{!Get_Rec.Id} (assuming Get_Rec is the element that retrieves the student record)

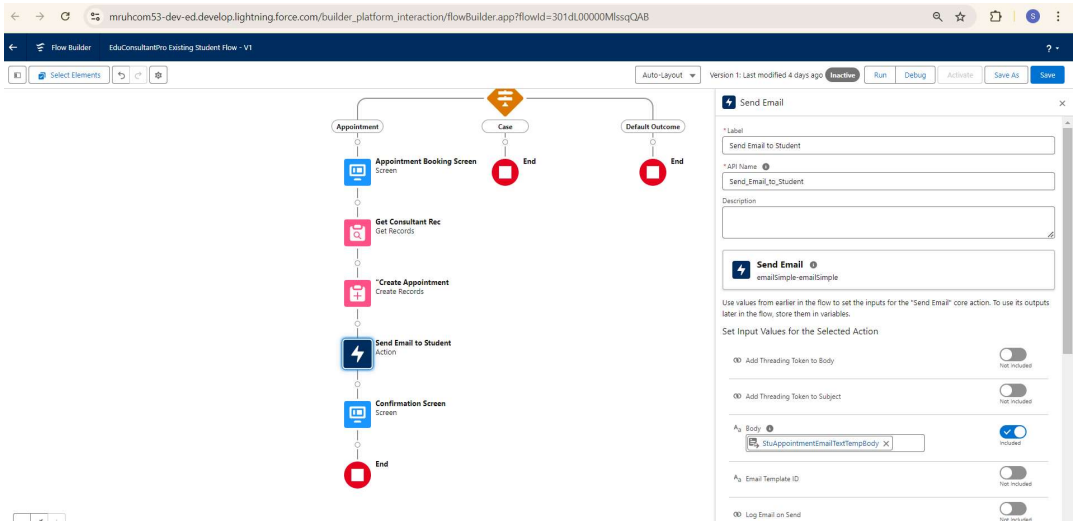
Save the Create Records Element:

- Click Done to save the Create Records configuration.



7.7 Add Screen Element

- Drag a Screen element from the left sidebar to the canvas, placing it after the Send Email to Student action element.



Configure the Screen Element:

- Label: Enter Confirmation Screen.

Add Display Text Component:

- From the left side panel, search for the Display Text component and drag it to the main panel.
- Label: Enter Appointment_Confirmation.

Add Confirmation Message:

- In the Display Text component, paste the following text in the Resource picker box:

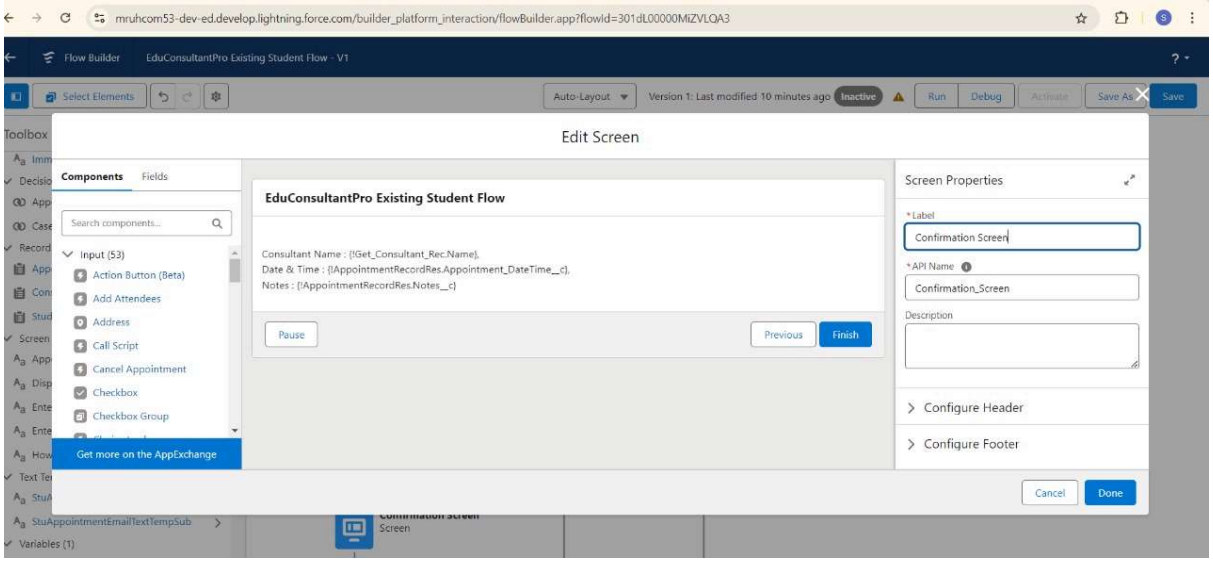
Consultant Name: {!Get_Consultant_Rec.Name},

Date & Time: {!AppointmentRecordRes.Appointment_DateTime__c},

Notes: {!AppointmentRecordRes.Notes__c}

Save the Display Text Component:

- Click Done to save the Display Text component



7.8 Add an SubFlow Element

- Drag a Subflow element from the left sidebar to the canvas, placing it after the Decision element on the Case path.

Configure the Subflow Element:

- Label: Enter Create Student Case.

Select the Subflow:

- Flow: Search for and select the subflow named Create a Case.

Save the Flow:

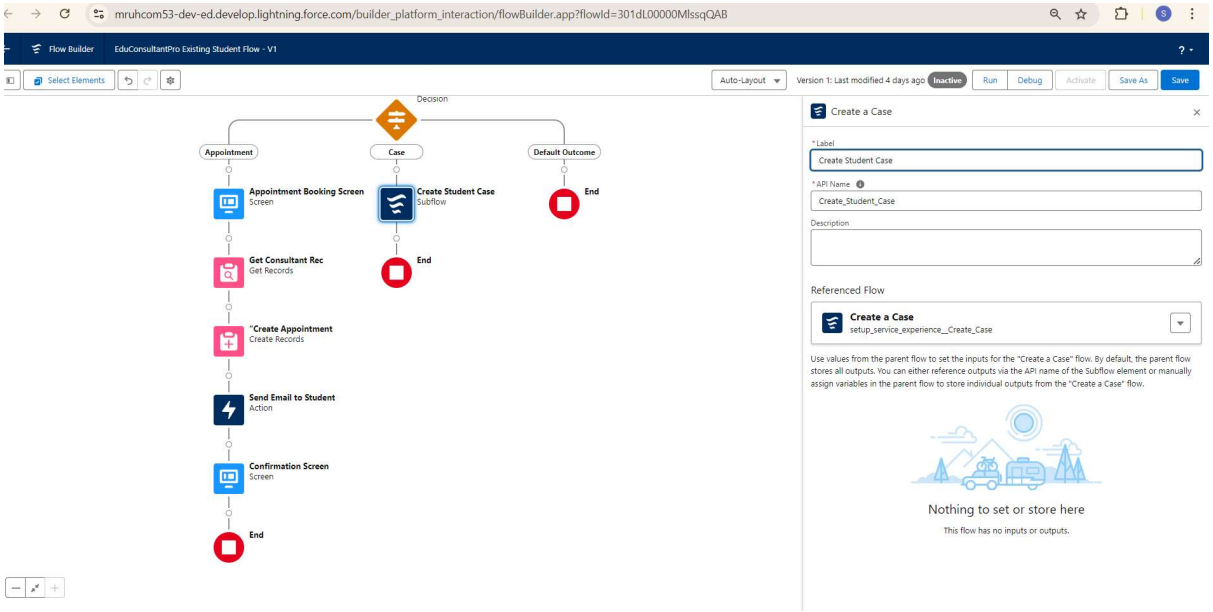
- Click Save.

Label the Flow:

- Flow Label: Enter EduConsultantPro Existing Student Flow.
- API Name: This will auto-populate based on the flow label.

Save and Activate the Flow:

- Click Save again to ensure the flow is saved.
- Click Activate to make the flow active.



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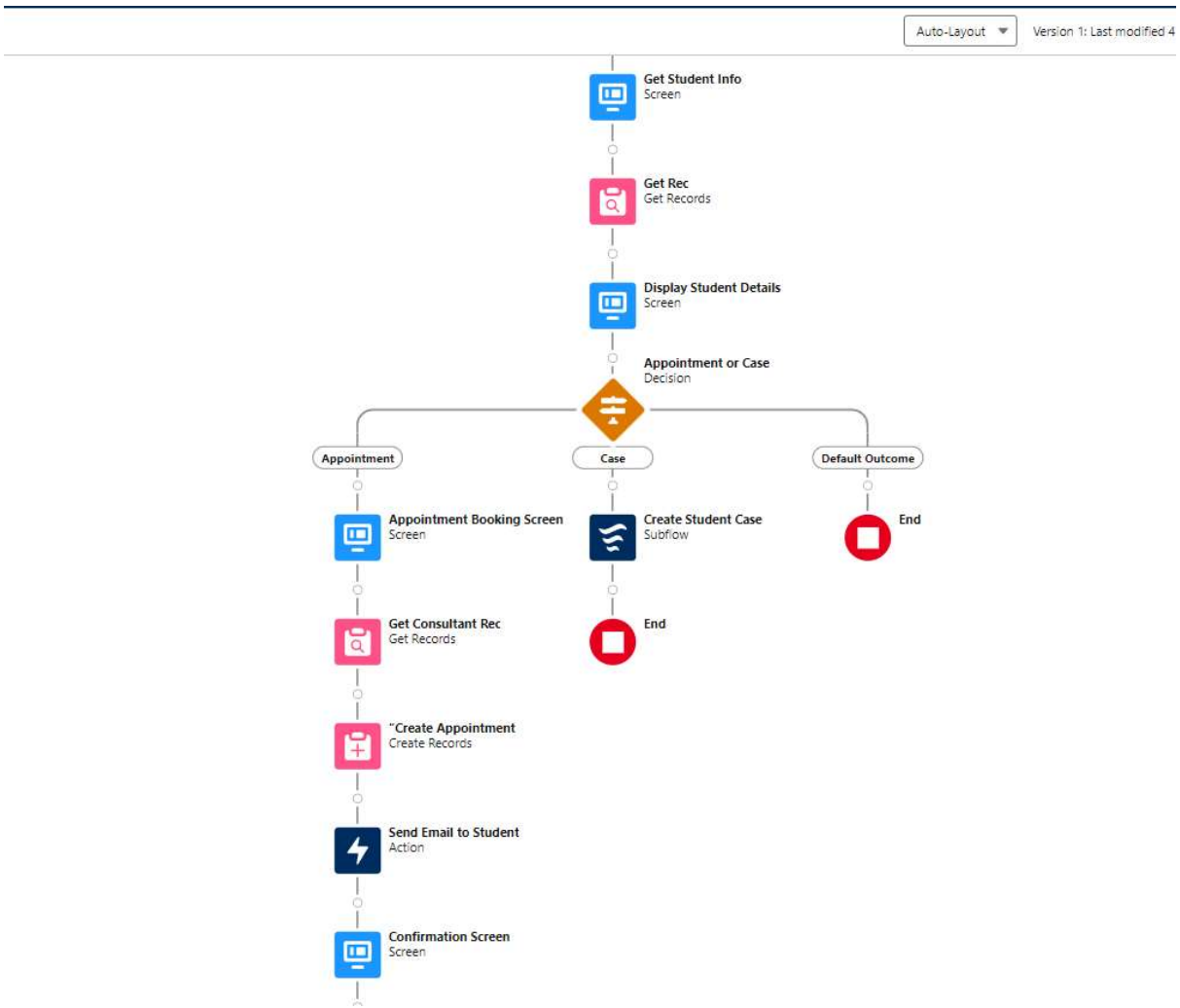

Auto-Layout
Version 1: Last modified 4
Get Student Info
Screen
Get Rec
Get Records
Display Student Details
Screen
Appointment or Case
Decision
Appointment
Case
Default Outcome
Appointment Booking Screen
Screen
Create Student Case
Subflow
End
Get Consultant Rec
Get Records
End
"Create Appointment
Create Records
Send Email to Student
Action
Confirmation Screen
Screen

8. Creating a ScreenFlow to Combine all the flows at one place

8.1 Add Screen Element

- Drag a Screen element from the left sidebar to the canvas.
- Label: Enter Welcome Screen.

Add Display Text Component:

- From the left side panel, search for the Display Text component and drag it to the main panel.
- Label: Enter SuccessMessage.

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.

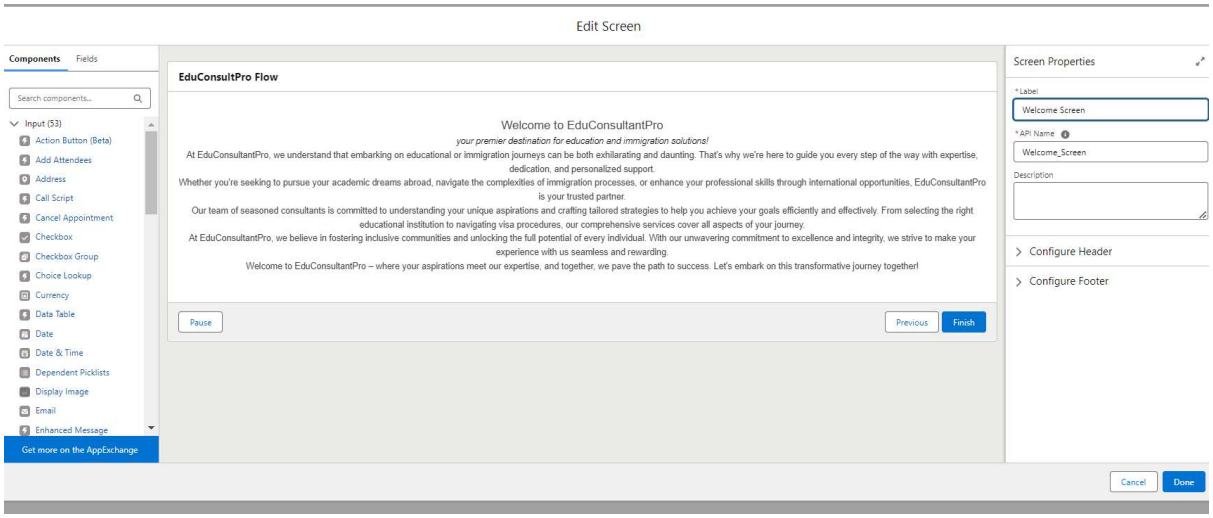
Welcome to EduConsultantPro – where your aspirations meet our expertise. Let's embark on this journey together!

Save the Display Text Component:

- Click Done to save the Display Text component.

Save the Screen Element:

- Click Done to save the Screen element.



8.2 Add Screen Element

- Drag a Screen element from the left sidebar to the canvas and place it after the Welcome Screen element.
- Label: Enter Existing or New Student Confirmation Screen.

Add Radio Button Component:

- From the left side panel, search for the Radio Buttons component and drag it to the main panel.
- Label: Enter Are you an Existing Student.

Add Choice Options:

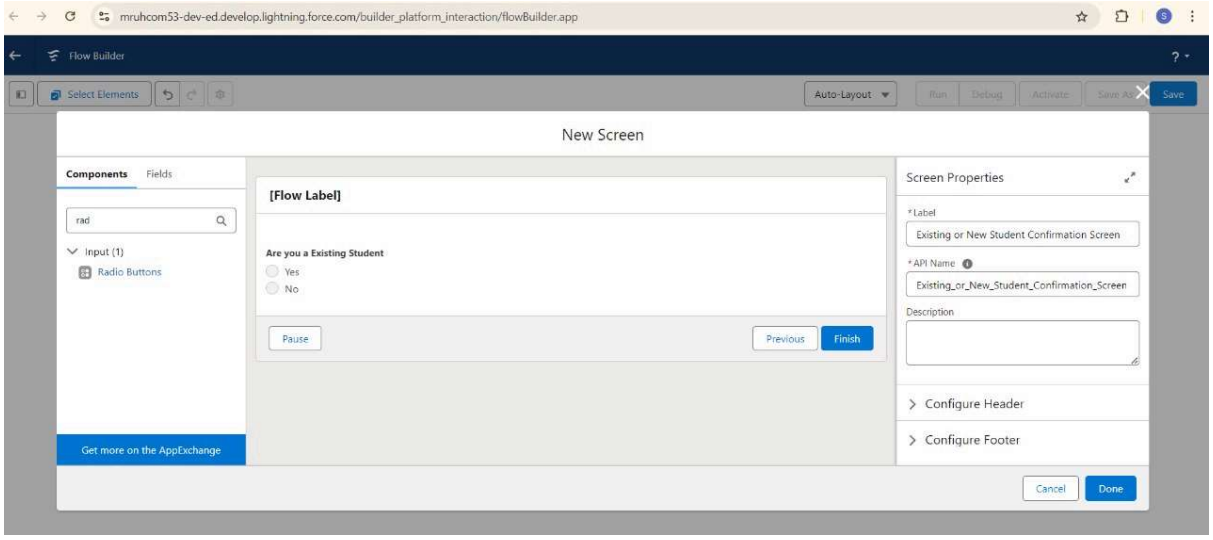
- Click on Add Choice.
  - Label: Enter Yes.
  - Click Create Yes choice.
- Click on Add Choice again.
  - Label: Enter No.
  - Click Create No choice.

Save the Radio Button Component:

- Click Done to save the radio button component.

Save the Screen Element:

- Click Done to save the Screen element.



8.3 Add Decision Element

- Drag a Decision element from the left sidebar to the canvas and place it after the Existing or New Student Confirmation Screen element.
- Label: Enter Decision 1.

Configure Outcome for Existing Student:

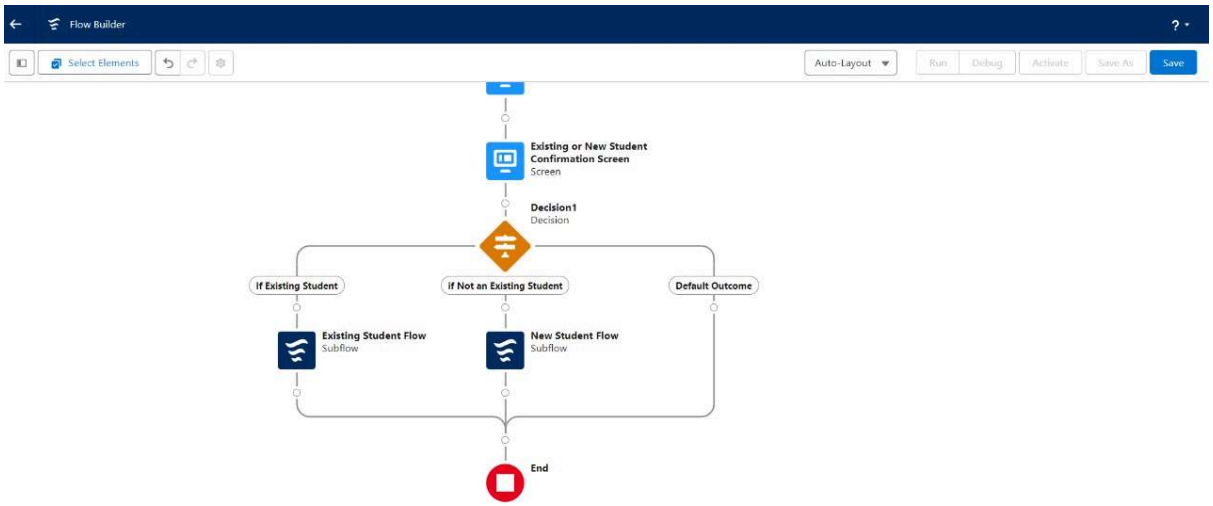
- Outcome Label: Enter If Existing Student.
- Condition:
  - Resource: Select {!Are_you_a_Existing_Student} (the radio button component from the previous screen).
  - Operator: Equals.
  - Value: Select {!Yes} (the choice created for Yes).

Configure Outcome for New Student:

- Click the + icon to add a new outcome.
- Outcome Label: Enter If New Student.
- Condition:
  - Resource: Select {!Are_you_a_Existing_Student}.
  - Operator: Equals.
  - Value: Select {!No} (the choice created for No).

Save the Decision Element:

- Click Done to save the Decision element.



8.4 Add an SubFlow Element

- Drag a Subflow element from the left sidebar to the canvas and place it on the "If Existing Student" path.
- Label: Enter Existing Student Flow.

Configure the Subflow:

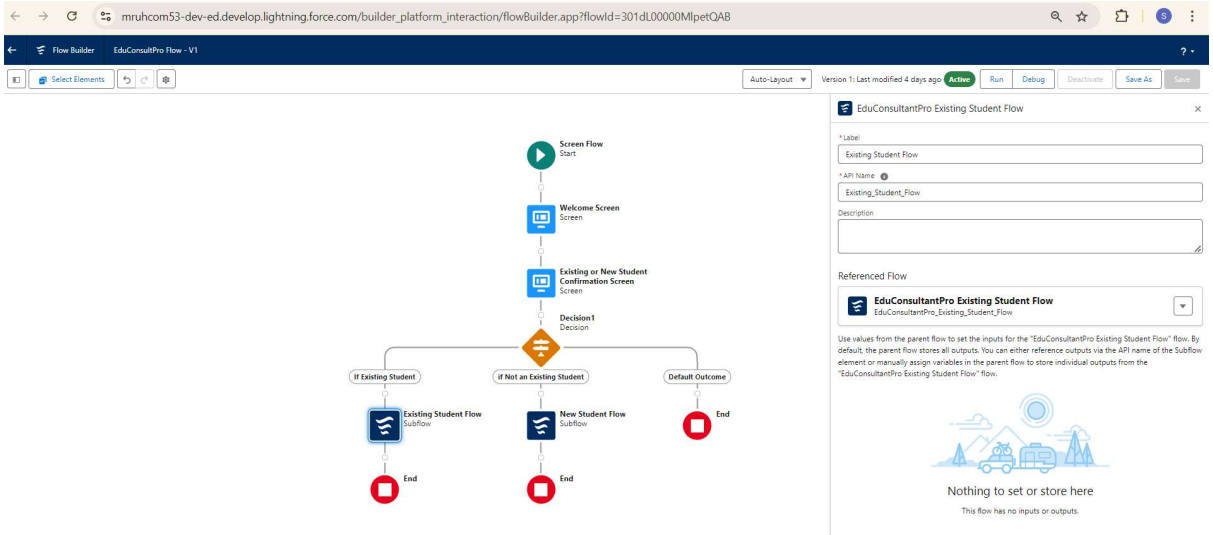
- Subflow Selection: Search for and select EduConsultantPro Existing Student Flow.

Save the Flow:

- Click Save.
- Flow Label: Enter EduConsultantPro Existing Student Flow.

Finalize the Subflow Element:

- Click Done to save the Subflow element



8.5 Add an SubFlow Element

- Drag a Subflow element from the left sidebar to the canvas and place it on the "If New Student" path.
- Label: Enter New Student Flow.

Configure the Subflow:

- Subflow Selection: Search for and select EduConsultantPro Student Flow.

Save the Flow:

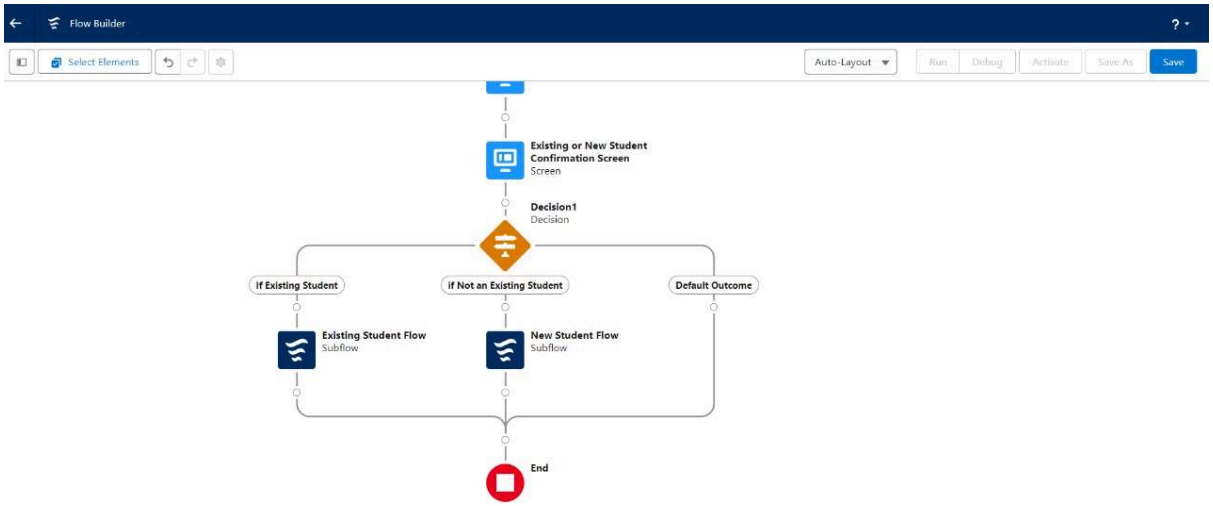
- Click Save.
- Flow Label: Enter EduConsultPro Flow.

Finalize the Subflow Element:

- Click Done to save the Subflow element.

Final Save:

- Click Save to finalize and save the entire flow and the main flow is labeled EduConsultPro Flow.


Flow Builder
Select Elements
Auto-Layout
Run
Debug
Activate
Save As
Save
Existing or New Student Confirmation Screen
Screen
Decision1
Decision
If Existing Student
If Not an Existing Student
Default Outcome
Existing Student Flow
Subflow
New Student Flow
Subflow
End

9. Create a lightning app page

Create a New Lightning Home Page:

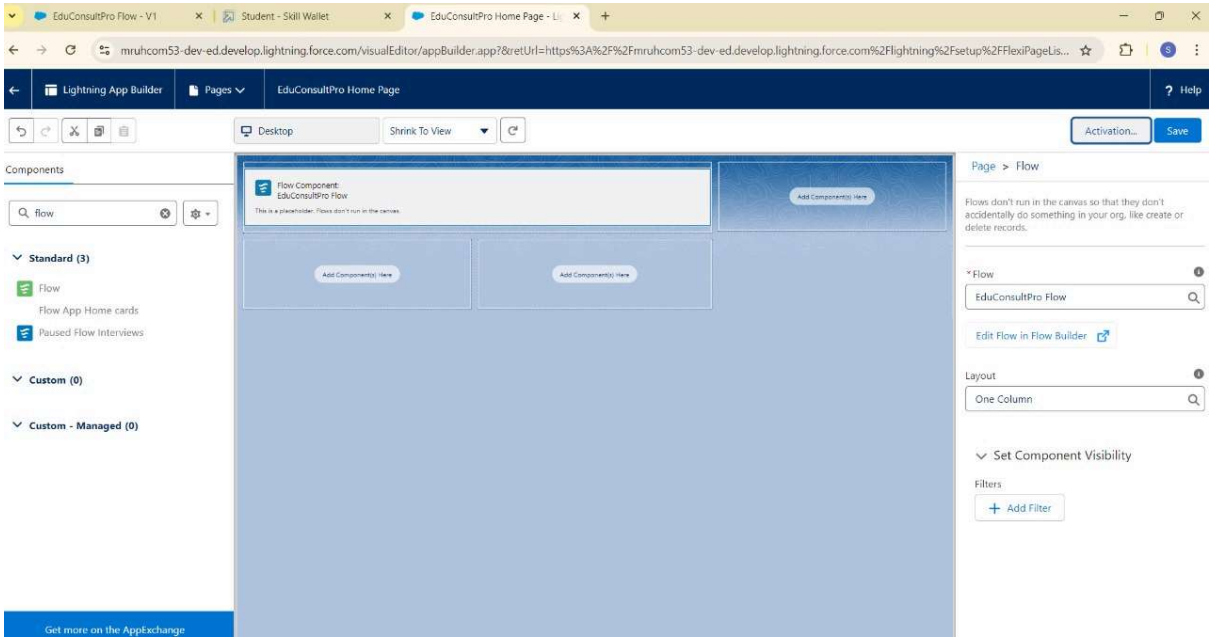
- Go to Setup and enter App Builder in the Quick Find box.
- Click Lightning App Builder.
- Click New, select Home Page, then click Next.
- Name the page EduConsultPro Home Page.
- Select the Standard Home Page template.
- Click Done.

Configure the Home Page:

- Drag the Flow component to the top-right region of the page.
- Search for EduConsultPro Flow and select it.

Save and Activate the Page:

- Click Save.
- Click Activate.
- Click App and Profile.
- Click Assign to Apps and Profiles.
- Select the Sales app, then click Next.
- Scroll down and select System Administrator profile.
- Click Next.
- Review the assignment and click Save.


EduConsultPro Flow - V1
Student - Skill Wallet
EduConsultPro Home Page - Li
mruhcom53-dev-ed.develop.lightning.force.com/visualEditor/appBuilder.app?&retUrl=https%3A%2F%2Fmruhcom53-dev-ed.develop.lightning.force.com%2Flightning%2Fsetup%2FFlexiPageLis...
Lightning App Builder
Pages
EduConsultPro Home Page
Help
Desktop
Shrink To View
Activation...
Save
Components
flow
Standard (3)
Flow
Flow App Home cards
Paused Flow Interviews
Custom (0)
Custom - Managed (0)
Get more on the AppExchange
Flow Component:
EduConsultPro Flow
This is a placeholder. Flows don't run in the canvas.
Add Component(s) Here
Page > Flow
Flows don't run in the canvas so that they don't accidentally do something in your org, like create or delete records.
*Flow
EduConsultPro Flow
Edit Flow in Flow Builder
Layout
One Column
Set Component Visibility
Filters
Add Filter

10.Conclusion

The EduConsultPro project has successfully transformed EduConsultPro Institute's operations by leveraging Salesforce to streamline admissions, consulting services, and immigration case management. Through the creation of customized objects, efficient flows, and automated processes, we've enhanced data management and user experience.

Key achievements include:

1. **Integrated Data Management**: Seamless creation and linkage of objects like Courses, Consultants, and Students.
2. **Optimized Processes**: Automated flows for admissions and appointments reduce manual effort and errors.
3. **Enhanced Communication**: Personalized screens and email templates improve engagement and efficiency.
4. **Effective Approvals**: Robust approval processes ensure compliance and effective management.
5. **Streamlined Access**: Integration into the Lightning App Builder provides a cohesive user experience.

These advancements position EduConsultPro Institute for greater efficiency and better support for its students, setting a new benchmark for operational excellence.