

Library Management:- Phase 4: Process Automation (Admin)

1. Validation Rules

- A validation rule created on Teacher object HireDate_Not_Future Date/ Time Hire Date cannot be blank or in the future.
- A validation rule created on Teacher object Email_Blank Please enter a valid email address.

The screenshot shows the Salesforce Setup interface. The left sidebar contains a navigation menu with options like 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, Restriction Rules, and Scoping Rules. The main content area is titled 'SETUP > OBJECT MANAGER Teacher'. It displays a table of Validation Rules for the Teacher object, sorted by Rule Name. The table has columns for Rule Name, Error Location, Error Message, Active status, and Modified By. Two rules are listed: 'Email_Blank' and 'HireDate_Not_Future'.

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Email_Blank	Email	Please enter a valid email address.	✓	Priyanka Pillai, 9/22/2025, 10:39 AM
HireDate_Not_Future	Hire Date	Hire Date cannot be blank or in the future.	✓	Priyanka Pillai, 9/22/2025, 9:34 AM

Validation Rules

The screenshot shows the Salesforce Teacher record page. A modal window is open for editing the record. The modal contains fields for Employee ID, Subject Specialization (Mathematics), Email (e@gmail.com), Joining Date (9/7/2017), Contact (Rakesh sharma), and Mentor (M_ID-001235). The Hire Date field is highlighted in red, indicating a validation error. A red banner at the bottom of the modal reads 'We hit a snag.' and lists the fields to review: Hire Date. The modal also has buttons for Cancel, Save & New, and Save.

Validation Rules Testing

2. Email Templates for Automation

Two classic email templates were created and stored under Private Email Templates:

Teacher_HireDate_Confirmation : – sends confirmation to the teacher when a date is created or confirmed.

The screenshot shows the 'Teacher_HireDate_Confirmation' email template in a system interface. The interface includes a top navigation bar with a search bar and various icons. Below the navigation bar, the template name 'Teacher_HireDate_Confirmation' is displayed. The template is categorized under 'Private Email Templates'. The 'Details' tab is active, showing the following information:

Information	
Email Template Name	Teacher_HireDate_Confirmation
Description	
Made in Email Template Builder	<input type="checkbox"/>
Related Entity Type	Teacher
Folder	Private Email Templates

The 'Message Content' tab is also visible, showing the following details:

Message Content	
Subject	Confirmation: Record Created for {{{Teacher_c.Name}}}
HTML Value	Hello {{{Teacher_c.Name}}}, This is a confirmation that your record has been created successfully in our system on {{{Teacher_c.CreatedDate}}}. If you have any questions, please contact us. Thank you, Admin Team

Teacher_HireDate_Confirmation

Teacher_HireDate_Reminder :-

The screenshot shows the 'Teacher_HireDate_Reminder' email template in a system interface. The interface includes a top navigation bar with a search bar and various icons. Below the navigation bar, the template name 'Teacher_HireDate_Reminder' is displayed. The template is categorized under 'Private Email Templates'. The 'Details' tab is active, showing the following information:

Information	
Email Template Name	Teacher_HireDate_Reminder
Description	
Made in Email Template Builder	<input type="checkbox"/>
Related Entity Type	Teacher
Folder	Private Email Templates

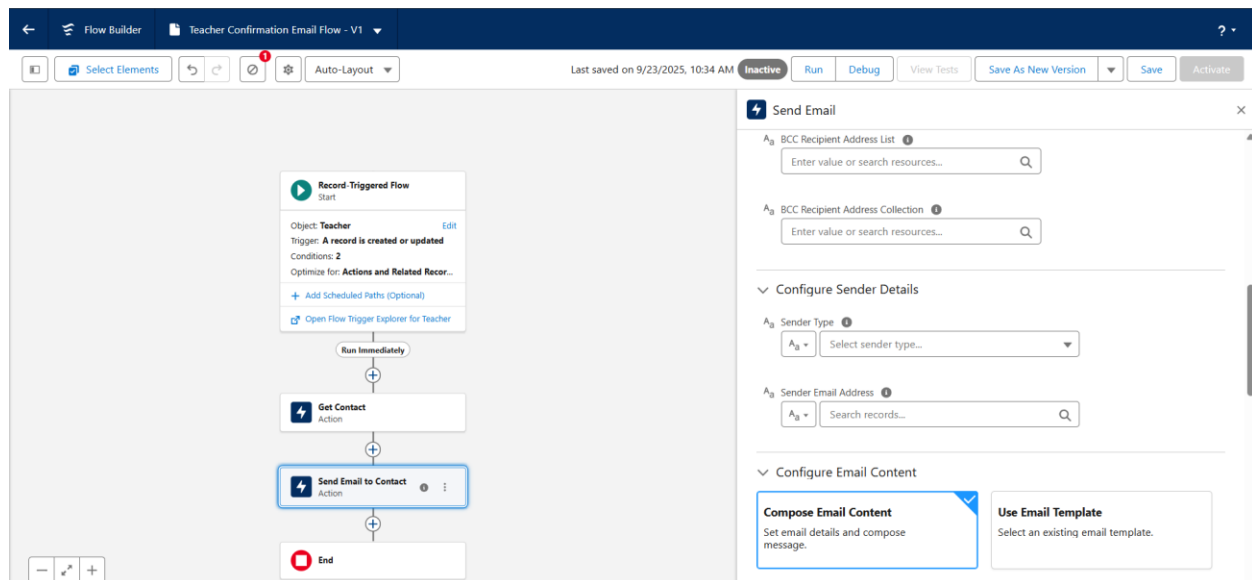
The 'Message Content' tab is also visible, showing the following details:

Message Content	
Subject	Reminder: Your Hire Date is {{{Teacher_c.Hire_Date_c}}}
HTML Value	Hello {{{Teacher_c.Name}}}, This is a reminder that your hire date is {{{Teacher_c.Hire_Date_c}}}. Thank you, HR Team

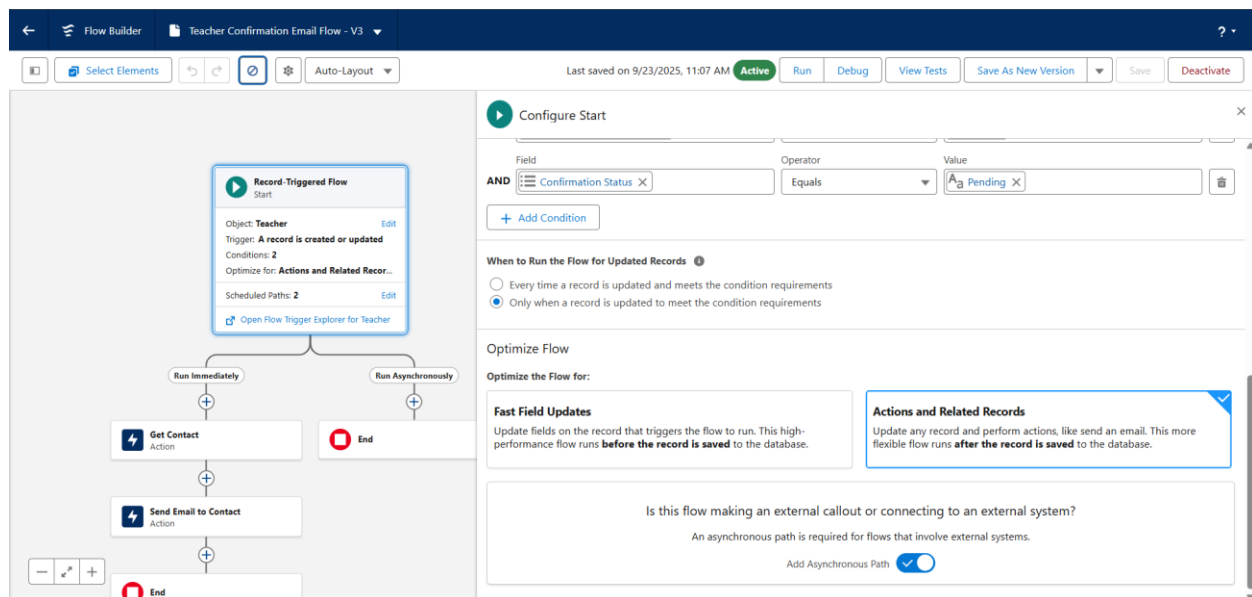
Teacher_HireDate_Reminder

3. Flow for TeacherConfirmation :-

- A record-triggered flow “Teacher_Confirmation_Flow” built on Teacher object:
- Trigger: When record is created or when Status changes to “Confirmed.”
- Action:
- Update “Confirmation Sent” checkbox on the Teacher.



4. Reminder Notification & Email (Scheduled Path)



6. Quick Action – “Mark as Completed”

A Quick Action added Teacher object:

- **Action Type: Update a Record.**
- **Predefined Field Values: Status c = “Completed.”**

The screenshot shows the Salesforce Setup interface for configuring a Quick Action on the Teacher object. The left sidebar contains navigation links: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, **Buttons, Links, and Actions** (selected), Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules.

The main content area is titled "Teacher Action" and "Mark as Completed". It includes a "Predefined Field Values" section with a table:

Action	Field Name	API Name	Field Type	Value
Edit Del	Confirmation Status	Confirmation_Status__c	Picklist	Email Sent

Below the table, it says "Always show me fewer / more records per related list".

Mark as Completed

8. Testing & Results

Sample Appointments were created to test the automation:

Your Teacher Profile is Confirmed Inbox x



Priyanka Pillai via [o1wk3nppevily.gk-7idvbuau.can96.bnc.salesforce.com](#)
to me ▾

Dear Ms. ELizabeth,

Welcome! Your profile has been successfully added to our system.

Details:

Hire Date: 9/16/2016, 9:00 AM

Department:

Position:

If you have any questions, please reach out to our admin team.

Best regards,
The Admin Team

↩ Reply

➦ Forward