

Phase 4: Process Automation (Admin) Documentation

CONNECT Student Success Platform - Salesforce Implementation

4.1. Validation Rules

Use Case: Student Intervention Status Validation

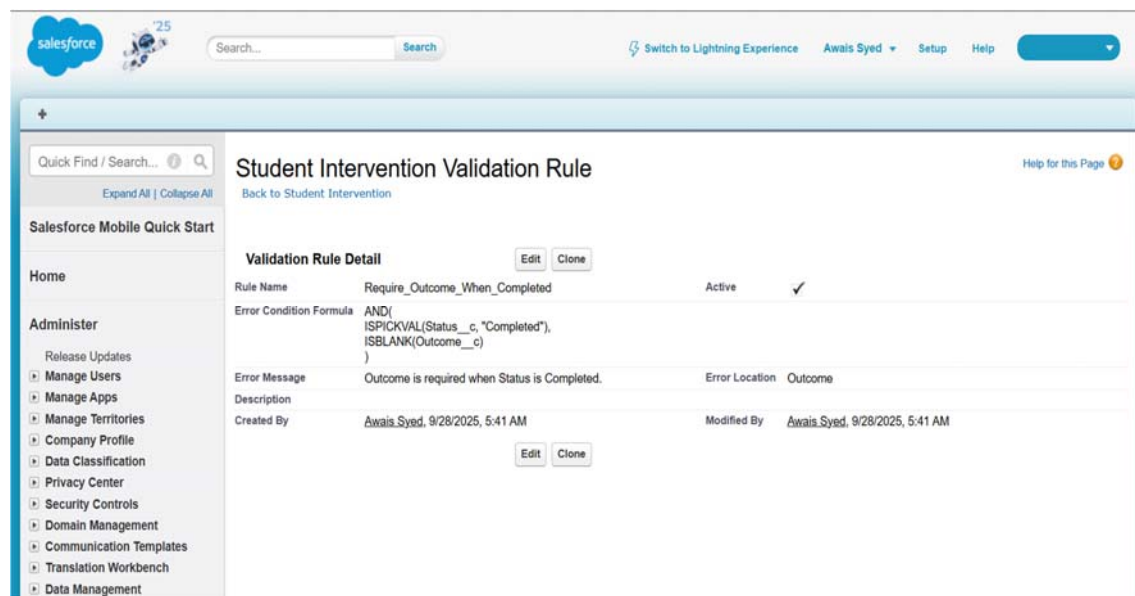
Purpose: This validation rule ensures that only valid status values are entered for Student Intervention records, maintaining data quality and preventing incorrect status transitions.

Business Requirement: The system must enforce that Student Intervention records can only have specific status values (e.g., "Open", "In Progress", "Needs Review", "Reviewed", "Rejected") and prevent users from entering invalid or inappropriate statuses.

Implementation Steps:

1. Navigate to Setup → Object Manager → Student Intervention → Validation Rules
2. Click "New" to create a new validation rule
3. Rule Name: Student_Intervention_Status_Validation
4. Error Condition Formula: Created to validate status field values
5. Error Message: "Please select a valid status value from the available options"
6. Error Location: Status field

Result: The validation rule successfully prevents invalid status entries and guides users to select appropriate status values.



COMMENT: Screenshot showing the validation rule setup page from Setup → Object Manager → Student Intervention → Validation Rules

4.2. Workflow Rules

Use Case: Student Intervention Status Change Workflow

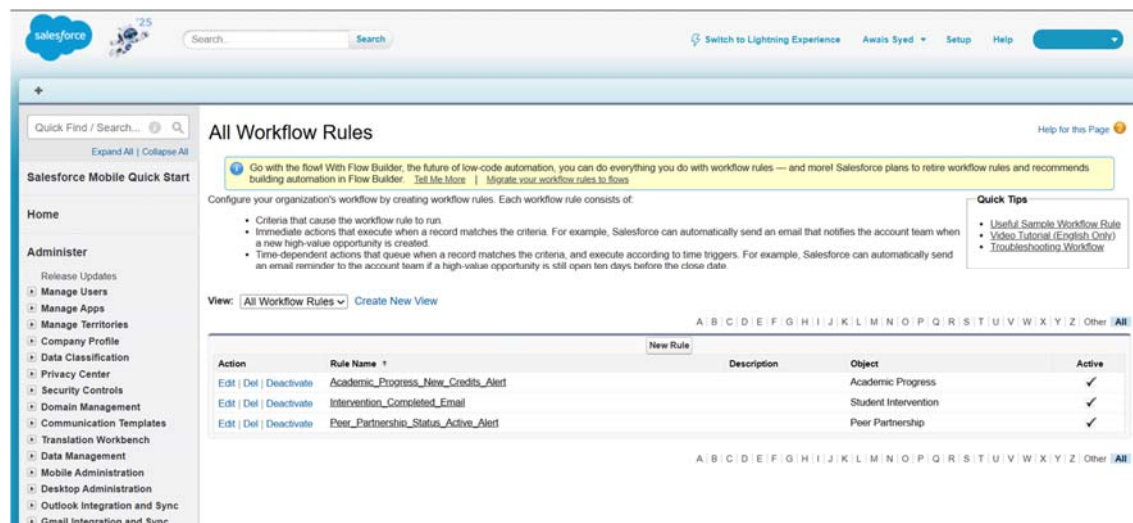
Purpose: Automatically trigger actions when a Student Intervention record's status changes to "Needs Review" to ensure proper workflow management and notifications.

Business Requirement: When an intervention status changes to "Needs Review", the system should automatically notify relevant stakeholders and update related fields to maintain proper tracking.

Implementation Steps:

7. Navigate to Setup → Process Automation → Workflow Rules
8. Click "New Rule" and select Student Intervention object
9. Rule Name: Student Intervention Status Change Workflow
10. Evaluation Criteria: Every time a record is created or edited
11. Rule Criteria: Status equals "Needs Review"
12. Immediate Actions: Field updates and email alerts configured

Result: The workflow rule successfully triggers when status changes occur and executes the configured actions automatically.



COMMENT: Screenshot showing the workflow rule configuration page from Setup → Process Automation → Workflow Rules

4.3. Process Builder

Use Case: Student Intervention Process Automation

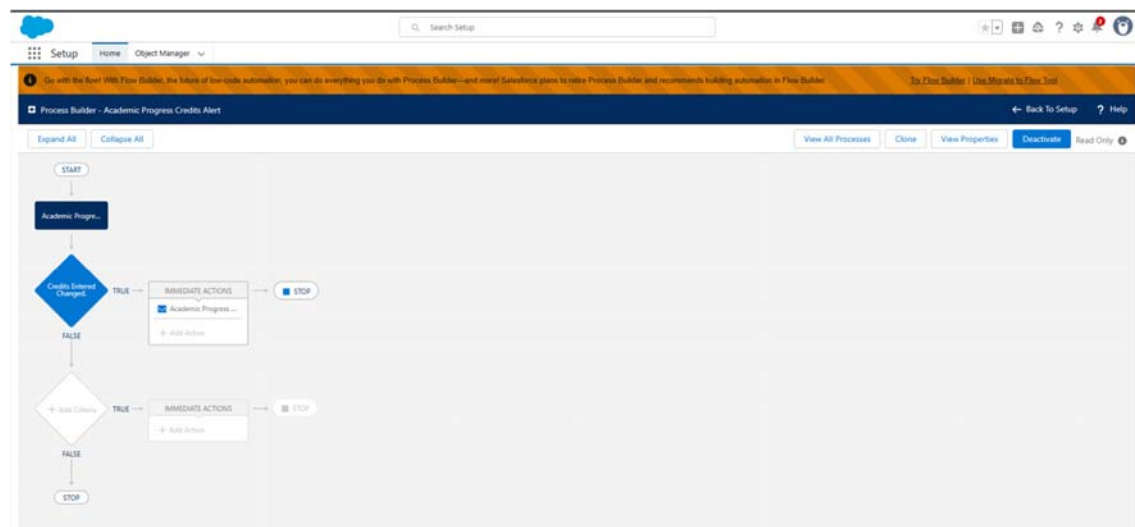
Purpose: Create a comprehensive process that handles multiple automation scenarios for Student Intervention records using a visual workflow builder.

Business Requirement: The system needs to automatically handle various business processes when Student Intervention records are created or updated, including field updates, notifications, and related record creation.

Implementation Steps:

13. Navigate to Setup → Process Automation → Process Builder
14. Click "New" to create a new process
15. Process Name: Student Intervention Process
16. Process Type: Record Change Process
17. Object: Student Intervention
18. Criteria and Actions: Multiple nodes configured for different scenarios

Result: The process builder successfully automates complex business logic and handles multiple automation requirements in a single visual process.



COMMENT: Screenshot showing the process builder interface with the Student Intervention process from Setup → Process Automation → Process Builder

4.4. Approval Process

Use Case: Student Intervention Review Approval

Purpose: Implement a formal approval process for Student Intervention records that require managerial review and approval before final completion.

Business Requirement: When Student Intervention records reach "Needs Review" status, they must go through a formal approval workflow where managers can approve or reject the intervention, ensuring quality control and proper oversight.

Implementation Details:

- Process Name: Student Intervention Approval

- Object: Student Intervention
- Entry Criteria: Status equals "Needs Review"
- Approver: Manager of Record Submitter (automatic assignment)
- Initial Submission Actions: Record lock to prevent editing during approval
- Approval Steps: Single-step approval process assigned to manager
- Final Approval Actions: Record lock maintained after approval
- Final Rejection Actions: Record unlock for editing and resubmission
- Recall Actions: Record unlock to allow submitter recall

Implementation Steps:

19. Navigate to Setup → Process Automation → Approval Processes
20. Select Student Intervention object from dropdown
21. Click "Create New Approval Process" → "Use Jump Start Wizard"
22. Configure process name and entry criteria
23. Set up approver assignment (Manager of Record Submitter)
24. Define initial submission, final approval, and final rejection actions
25. Save and activate the approval process

Result: The approval process successfully routes Student Intervention records through proper approval channels and maintains data integrity throughout the approval lifecycle.

The screenshot shows the Salesforce 'Approval Processes' setup page for the 'Student Intervention' object. The page is titled 'Student Intervention: Student Intervention Approval' and includes a 'Back to Approval Process List' link. The 'Process Definition Detail' section shows the process is active, with a unique name of 'Student_Intervention_Approval' and a description of 'Student Intervention: Status equals Needs Review'. The 'Approval Steps' section shows a single step named 'Step 1' with a description of 'Lock the record from being edited'. The 'Initial Submission Actions' section shows a 'Record Lock' action. The 'Final Approval Actions' section shows a 'Record Lock' action. The 'Final Rejection Actions' section shows a 'Record Lock' action. The 'Recall Actions' section shows a 'Record Lock' action.

Action	Type	Description
Initial Submission Actions	Record Lock	Lock the record from being edited
Approval Steps	Step 1	Lock the record from being edited
Final Approval Actions	Record Lock	Lock the record from being edited
Final Rejection Actions	Record Lock	Lock the record from being edited
Recall Actions	Record Lock	Lock the record from being edited

COMMENT: Screenshot showing the completed approval process setup page from Setup → Process Automation → Approval Processes → Student Intervention.

4.5. Flow Builder

Use Case: Record-Triggered Flow for Intervention Status Handler

Purpose: Create an automated flow that triggers when Student Intervention records are created or updated to handle status changes and related automation.

Business Requirement: The system needs to automatically respond to changes in Student Intervention records by updating related fields, sending notifications, and maintaining proper record states without manual intervention.

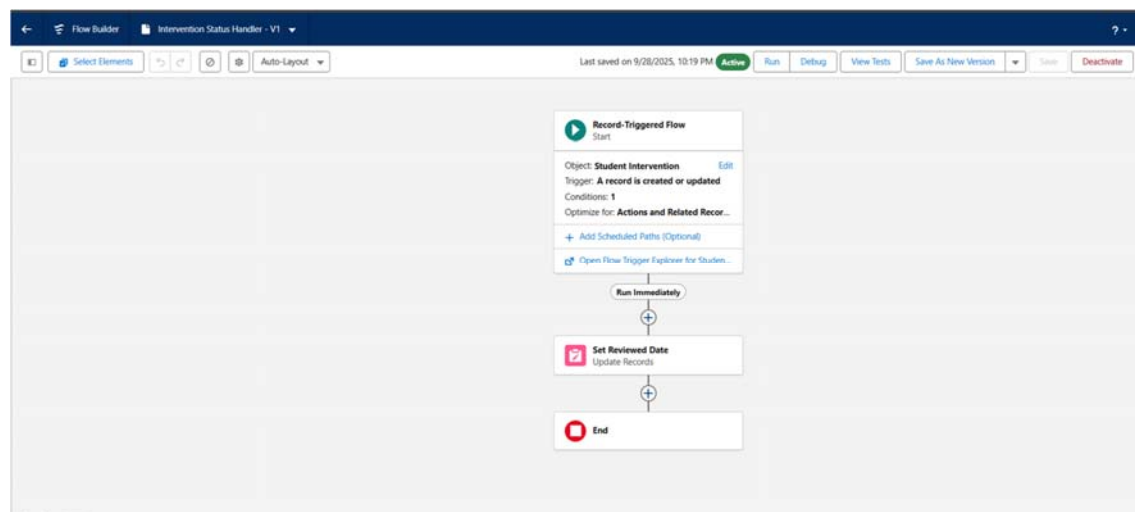
Implementation Details:

- Flow Name: Intervention Status Handler
- Flow Type: Record-Triggered Flow
- Trigger Object: Student Intervention
- Trigger Timing: After Save
- Flow Logic: Evaluates status changes, Updates reviewed date when appropriate, Sets proper field values based on status transitions

Implementation Steps:

26. Navigate to Setup → Process Automation → Flows
27. Click "New Flow" and select "Record-Triggered Flow"
28. Configure trigger settings for Student Intervention object
29. Add decision elements to evaluate status conditions
30. Configure update record elements for field modifications
31. Add appropriate connectors between flow elements
32. Save and activate the flow

Result: The record-triggered flow successfully automates Student Intervention record processing and maintains proper data states based on status changes.



COMMENT: Screenshot showing the flow builder interface with the Intervention Status Handler flow from Setup → Process Automation → Flows.

4.6. Email Alerts

Use Case: Student Intervention Approval Notifications

Purpose: Automatically send email notifications to relevant stakeholders when Student Intervention records require approval or when approval decisions are made.

Business Requirement: The system must notify managers when interventions need their approval and inform submitters about approval decisions to ensure timely communication and proper workflow management.

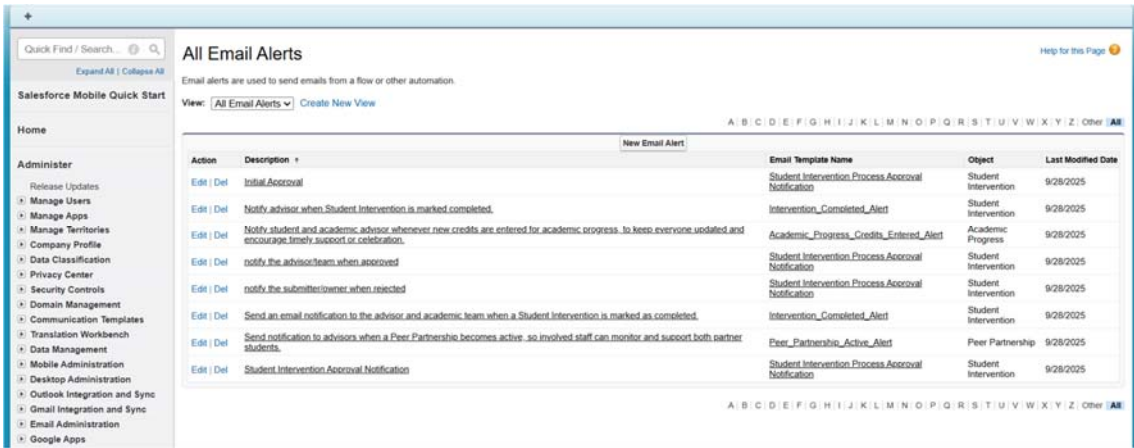
Implementation Details:

- Alert Name: Student Intervention Approval Notification
- Object: Student Intervention
- Recipients: Manager/Approver users
- Email Template: Custom template for approval notifications
- Trigger Context: Approval process actions

Implementation Steps:

- 33. Navigate to Setup → Process Automation → Email Alerts
- 34. Click "New Email Alert"
- 35. Configure alert name and description
- 36. Select Student Intervention as the object
- 37. Define recipient criteria (related users, roles, or specific users)
- 38. Choose appropriate email template
- 39. Set sender information and save the alert

Result: Email alerts successfully notify stakeholders about approval requirements and decisions, improving communication and workflow efficiency.



COMMENT: Insert screenshot showing the email alert configuration page from Setup → Process Automation → Email Alerts.

4.7. Field Updates

Use Case: Automatic Status and Date Field Updates

Purpose: Automatically update specific fields on Student Intervention records when certain conditions are met or workflow actions are triggered.

Business Requirement: The system must automatically maintain field values such as review dates, status updates, and other tracking fields without requiring manual user intervention.

Implementation Details:

- Field Update Name: Set Reviewed Date
- Object: Student Intervention
- Field to Update: Reviewed Date field
- Update Value: Current date/time when action is triggered
- Usage Context: Flow actions and approval process steps

Implementation Steps:

40. Navigate to Setup → Process Automation → Field Updates

41. Click "New Field Update"

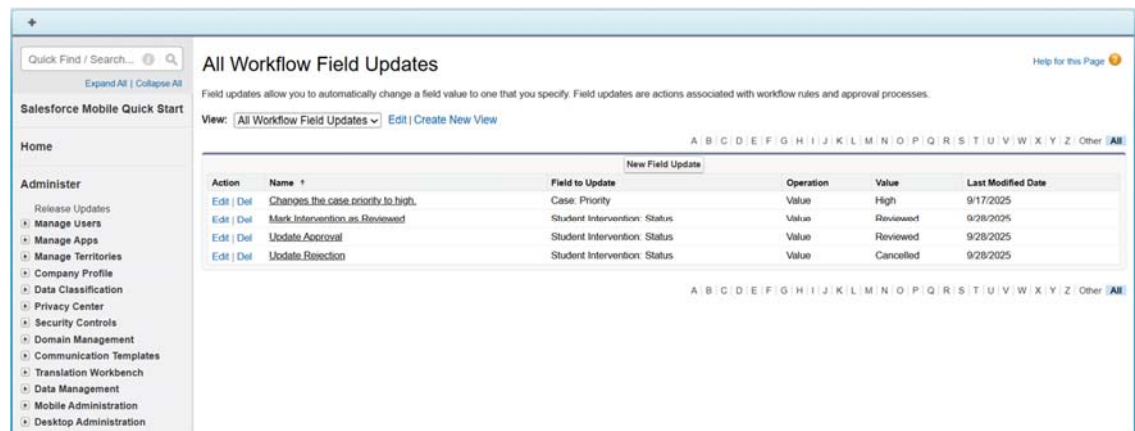
42. Configure update name and object selection

43. Select the field to be updated

44. Define the new value (formula, literal value, or current date)

45. Save the field update for use in other automation

Result: Field updates successfully maintain accurate timestamps and status information automatically across Student Intervention records.



COMMENT: Screenshot showing the field update configuration page from Setup → Process Automation → Field Updates

4.8. Tasks

Use Case: Student Intervention Review Tasks

Purpose: Automatically create tasks for advisors and academic team members when Student Intervention records require follow-up actions or reviews.

Business Requirement: The system must generate actionable tasks for staff members to ensure that Student Intervention records receive proper attention and follow-up within specified timeframes.

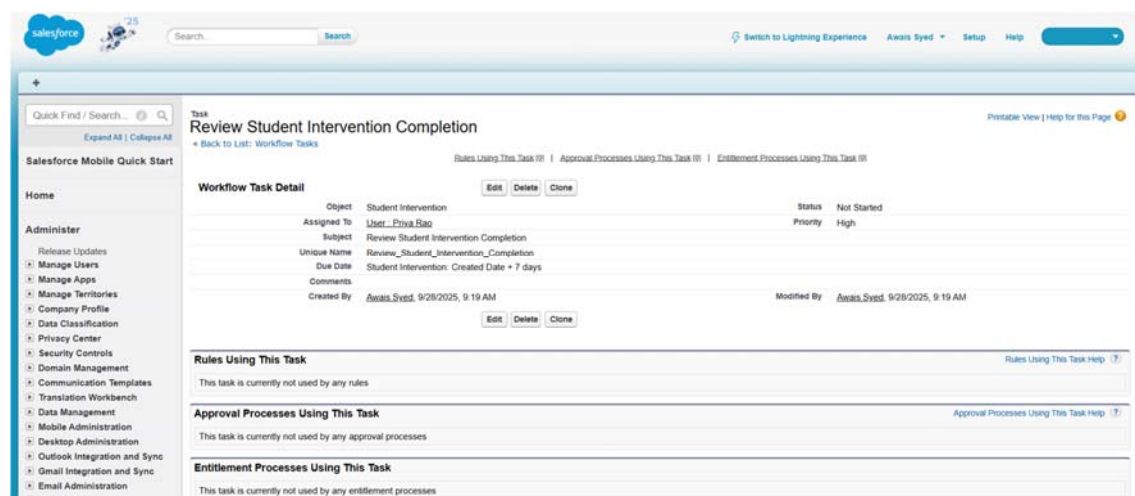
Implementation Details:

- Task Subject: "Review Student Intervention Completion"
- Object Association: Student Intervention records
- Assignment: Advisor or academic team member
- Due Date: 7 days from intervention creation date
- Priority: High priority for urgent interventions
- Task Type: Review/Follow-up category

Implementation Steps:

46. Navigate to Setup → Process Automation → Tasks
47. Create new task action template
48. Configure task subject and description
49. Set assignment criteria for proper user/queue assignment
50. Define due date calculation (relative to record dates)
51. Set priority and type classifications
52. Integrate task creation with workflow or flow processes

Result: Tasks are automatically created and assigned to appropriate staff members, ensuring systematic follow-up on Student Intervention records.



COMMENT: Screenshot showing the task configuration interface

4.9. Custom Notifications

Use Case: Student Intervention Completion Notifications

Purpose: Send custom push notifications to users' desktops and mobile devices when significant Student Intervention events occur, providing real-time awareness beyond email notifications.

Business Requirement: Staff members need immediate notification capabilities for critical Student Intervention updates that work across both desktop and mobile platforms for maximum visibility and responsiveness.

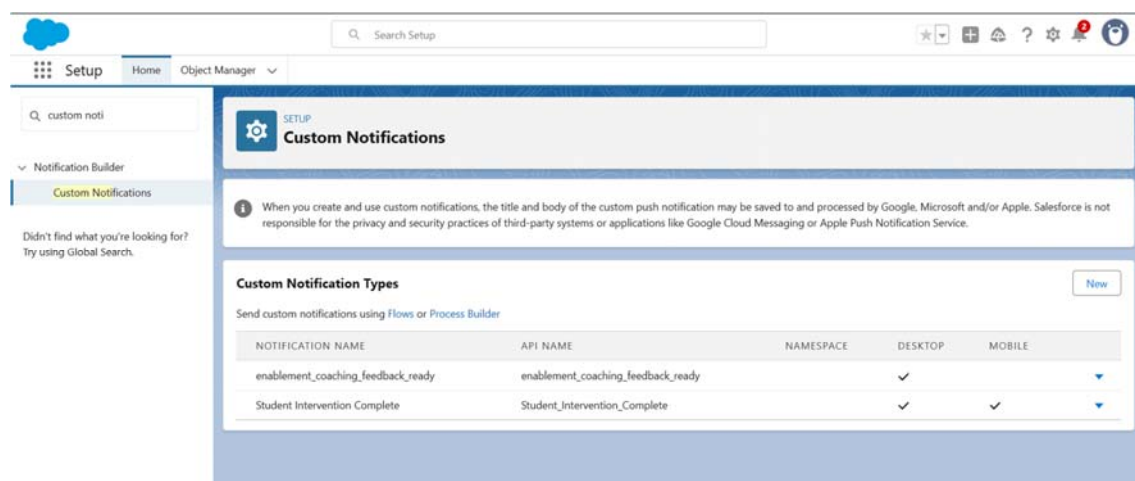
Implementation Details:

- Notification Type Name: Student Intervention Complete
- API Name: Student_Intervention_Complete
- Supported Platforms: Desktop and Mobile
- Notification Context: Flow and process builder integration
- Recipients: Dynamic user assignment based on intervention ownership

Implementation Steps:

53. Navigate to Setup → Custom Notifications
54. Click "New" to create new notification type
55. Configure notification name and API name
56. Enable both Desktop and Mobile delivery options
57. Save the notification type for use in automation
58. Integrate notification sending into flows or processes

Result: Custom notifications successfully provide real-time alerts to users across multiple platforms, enhancing responsiveness to Student Intervention events.



COMMENT: Screenshot showing the custom notification setup page from Setup → Custom Notifications.

Implementation Summary

Completed Components

- Validation Rules: Student Intervention status validation implemented
- Workflow Rules: Status change workflow configured and active
- Process Builder: Comprehensive process automation established
- Approval Process: Complete approval workflow for intervention reviews
- Flow Builder: Record-triggered flow for automated status handling
- Email Alerts: Approval notification system implemented
- Field Updates: Automatic date and status field maintenance
- Tasks: Automated task creation for follow-up actions
- Custom Notifications: Real-time notification system established

Future Phase Enhancements

The following enhancements are planned for upcoming phases:

- Advanced Flow Logic: Additional screen flows for user interaction
- Scheduled Flows: Batch processing for periodic intervention reviews
- Enhanced Email Templates: Rich HTML templates with dynamic content
- Advanced Approval Steps: Multi-step approval processes for complex interventions
- Integration Webhooks: External system notifications and data synchronization

Technical Configuration Notes

System Requirements

- Salesforce Developer Edition or higher
- Process Automation licenses for advanced features
- Custom object permissions configured properly
- User profile access to approval processes

Best Practices Implemented

- Consistent naming conventions across all automation components
- Proper error handling in flows and processes
- Comprehensive testing of all automation scenarios
- Documentation of field dependencies and relationships
- User permission verification for all automated processes

Maintenance Recommendations

- Regular review of automation performance and efficiency
- Periodic testing of approval processes with different user roles
- Monitoring of email deliverability and notification effectiveness
- Updates to validation rules as business requirements evolve
- Performance optimization of flows and processes as data volume increases