

# Phase 4 Completion Report – Process Automation (Admin)

## 1. Validation Rules

Validation rules ensure data integrity by enforcing constraints on field values. The following validation rules were created across different objects:

Steps to Create Validation Rule (applies to all rules):

1. Go to Setup → Object Manager → Select the required Object (e.g., Student).
2. Navigate to Validation Rules → New Rule.
3. Enter Rule Name and Description.
4. Define the Formula (logic specific to the rule).
5. Enter the Error Message and select Error Location.
6. Save & Activate.

Repeating repeat the steps for each rule as listed above.

- Guardian\_Required (Student) – Ensure Guardian is linked to every Student.

The screenshot shows the Salesforce 'Validation Rule Edit' interface for the 'Student' object. The rule name is 'Guardian\_Required' and it is active. The error condition formula is 'ISBLANK(Guardian\_\_c)'. A functions list on the right includes ABS, ACOS, ADDMONTHS, AND, ASCII, and ASIN. The interface also includes a 'Check Syntax' button and a 'Quick Tips' section.

SETUP > OBJECT MANAGER  
**Student**

the save will be aborted and the error message will be displayed. The user can correct the error and try again.

**Validation Rule Edit** Save Save & New Cancel

Rule Name: Guardian\_Required

Active: ☒

Description:

**Error Condition Formula** Required Information

Example: Discount\_Percent\_\_c > 0.30 More Examples...  
Display an error if Discount is more than 30%  
If this formula expression is **true**, display the text defined in the Error Message area

Insert Field Insert Operator

ISBLANK(Guardian\_\_c)

Check Syntax

Functions: --All Function Categories--  
ABS  
ACOS  
ADDMONTHS  
AND  
ASCII  
ASIN

Insert Selected Function  
ABS(number)  
Returns the absolute value of a number, a number without its sign  
Help on this function

Quick Tips  
• Operators & Functions

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## Student

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If this formula expression is **true**, display the text defined in the Error Message area

Insert Field
Insert Operator

ISBLANK(Guardian\_\_c)

Check Syntax

All Function Categories
ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN
Insert Selected Function
ABS(number)  
Returns the absolute value of a number, a number without its sign  
Help on this function

### Error Message

**Example:** Discount percent cannot exceed 30%

This message will appear when Error Condition formula is **true**

Error Message: Every student must be associated with a Guardian

This error message can either appear at the top of the page or below a specific field on the page

Error Location: ☐ Top of Page ☒ Field Guardian

Save Save & New Cancel

- Validate\_Email\_Format (Student) – Ensure Student email is in correct format.

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### Student Validation Rule

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Validation Rule Detail		Edit	Clone	Active	✓
Rule Name	Validate_Email_Format				
Error Condition Formula	NOT(ISBLANK(Email__c)) && NOT(CONTAINS(Email__c, "@"))				
Error Message	Please enter a valid email address.			Error Location	Email
Description					
Created By	Harshal Alaspure 9/17/2025, 8:59 AM			Modified By	Harshal Alaspure 9/17/2025, 8:59 AM

Edit Clone

- Phone\_Required (Guardian) – Ensure Guardian phone is mandatory.

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## Guardian

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### Guardian Validation Rule

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Validation Rule Detail		Edit	Clone	Active	✓
Rule Name	Phone_Required				
Error Condition Formula	ISBLANK(Phone__c)				
Error Message	Guardian phone number is required			Error Location	Phone
Description					
Created By	Harshal Alaspure 9/17/2025, 9:10 AM			Modified By	Harshal Alaspure 9/17/2025, 9:10 AM

Edit Clone

- Validate\_Email\_Format (Guardian) – Ensure Guardian email is valid format.

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**Guardian**

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### Guardian Validation Rule

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**Validation Rule Detail** [Edit](#) [Clone](#)

Rule Name	Validate_Email_Format	Active	✓
Error Condition Formula	NOT(ISBLANK(Email__c)) && NOT(CONTAINS(Email__c,"@"))		
Error Message	Enter a valid email address	Error Location	Email
Description			
Created By	Harshal Alaspure 9/17/2025, 9:26 AM	Modified By	Harshal Alaspure 9/17/2025, 9:26 AM

[Edit](#) [Clone](#)

- Course\_Required (Enrollment) – Enrollment must always have a Course.

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**Enrollment**

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### Enrollment Validation Rule

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**Validation Rule Detail** [Edit](#) [Clone](#)

Rule Name	Course_Required	Active	✓
Error Condition Formula	ISBLANK(Course__c)		
Error Message	Enrollment must be linked to a Course	Error Location	Course
Description			
Created By	Harshal Alaspure 9/17/2025, 9:32 AM	Modified By	Harshal Alaspure 9/17/2025, 9:32 AM

[Edit](#) [Clone](#)

- Enrollment\_Date\_Not\_Future (Enrollment) – Enrollment date cannot be in the future.

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**Enrollment**

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### Enrollment Validation Rule

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**Validation Rule Detail** [Edit](#) [Clone](#)

Rule Name	Enrollment_Date_Not_Future	Active	✓
Error Condition Formula	AND( NOT(ISBLANK(Enrollment_Date__c)), Enrollment_Date__c > TODAY() )		
Error Message	Date cannot be in the future	Error Location	Enrollment Date
Description			
Created By	Harshal Alaspure 9/17/2025, 9:33 AM	Modified By	Harshal Alaspure 9/17/2025, 9:33 AM

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- No\_Duplicate\_Enrollment (Enrollment) – Prevent duplicate enrollments for the same course/student.

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Validation Rule Detail		Edit		Clone	
Rule Name	No_Duplicate_Enrollment	Active	✓		
Error Condition Formula	AND( NOT(ISBLANK(Student__C)), NOT(ISBLANK(Course__C)), ISPRIVILEGE(Status__C "Active"), NOT(ISNEW()), Student__C = PRIORVALUE(Student__C), Course__C = PRIORVALUE(Course__C) )				
Error Message	This student is already enrolled in the selected course	Error Location	Student		
Description					
Created By	Harshal Alaspure	9/17/2025, 9:34 AM	Modified By	Harshal Alaspure	9/17/2025, 9:34 AM
		Edit		Clone	

- Status\_Required (Enrollment) – Status is mandatory on Enrollment.

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Validation Rule Detail		Edit		Clone	
Rule Name	Status_Required	Active	✓		
Error Condition Formula	ISBLANK(TEXT(Status__C))				
Error Message	Please select an Enrollment Status (Active / Completed / Dropped)	Error Location	Status		
Description					
Created By	Harshal Alaspure	9/17/2025, 9:36 AM	Modified By	Harshal Alaspure	9/17/2025, 9:36 AM
		Edit		Clone	

- Attendance\_Date\_Not\_Future (Attendance) – Attendance date cannot be in the future.

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## Attendance

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Validation Rule Detail			
Rule Name	Attendance_Date_Not_Future	Active	✓
Error Condition Formula	AND( NOT(ISBLANK( Date__c )), Date__c > TODAY() )		
Error Message	Attendance Date cannot be in the future	Error Location	Date
Description			
Created By	Harshal Ailaspure 9/17/2025, 9:40 AM	Modified By	Harshal Ailaspure 9/17/2025, 9:40 AM

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- Attendance\_Not\_Before\_EnrollmentStart (Attendance) – Attendance cannot be before the enrollment date.

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Validation Rule Detail			
Rule Name	Attendance_Not_Before_EnrollmentStart	Active	✓
Error Condition Formula	AND( NOT(ISBLANK( Date__c )), NOT(ISBLANK( Enrollment__r Enrollment_Date__c )), Date__c < Enrollment__r Enrollment_Date__c )		
Error Message	Attendance cannot be before the student's enrollment start date	Error Location	Date
Description			
Created By	Harshal Ailaspure 9/17/2025, 9:50 AM	Modified By	Harshal Ailaspure 9/17/2025, 9:50 AM

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- Enrollment\_Link\_Required (Attendance) – Attendance must be linked to an Enrollment record.

SETUP > OBJECT MANAGER

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Validation Rule Detail			
Rule Name	Enrollment_Link_Required	Active	✓
Error Condition Formula	ISBLANK(Enrollment__c)		
Error Message	Attendance must be linked to a valid Enrollment record	Error Location	Enrollment
Description			
Created By	Harshal Ailaspure 9/17/2025, 9:42 AM	Modified By	Harshal Ailaspure 9/17/2025, 9:42 AM

[Edit](#)
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- Status\_Required (Attendance) – Status is mandatory on Attendance.

The screenshot shows the 'Attendance Validation Rule' configuration page. The left sidebar contains a list of configuration categories: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, Scoping Rules, Object Access, and Triggers. The main content area is titled 'Attendance Validation Rule' and includes a 'Back to Attendance' link. Below the title is a 'Validation Rule Detail' section with a table of configuration details.

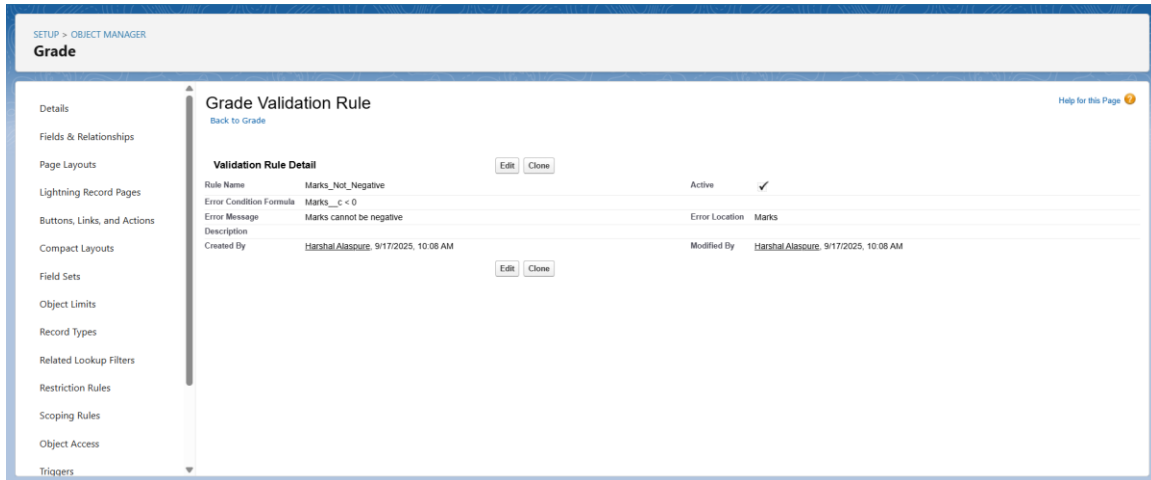
Validation Rule Detail		Active
Rule Name	Status_Required	✓
Error Condition Formula	ISBLANK(TEXT(Status__c))	
Error Message	Attendance status must be selected (Present, Absent, or Leave)	Error Location: Status
Description		
Created By	Harshal Ailaspure 9/17/2025, 9:47 AM	Modified By: Harshal Ailaspure 9/17/2025, 9:47 AM

- Marks\_Not\_Exceed\_Max (Grade) – Marks should not exceed maximum marks.

The screenshot shows the 'Grade Validation Rule' configuration page. The left sidebar contains a list of configuration categories: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, Scoping Rules, Object Access, and Triggers. The main content area is titled 'Grade Validation Rule' and includes a 'Back to Grade' link. Below the title is a 'Validation Rule Detail' section with a table of configuration details.

Validation Rule Detail		Active
Rule Name	Marks_Not_Exceed_Max	✓
Error Condition Formula	AND( NOT(ISBLANK( Marks__c )), NOT(ISBLANK( Max_Marks__c )), Marks__c > Max_Marks__c )	
Error Message	Marks Obtained cannot exceed Assignment Maximum Marks	Error Location: Marks
Description		
Created By	Harshal Ailaspure 9/17/2025, 10:13 AM	Modified By: Harshal Ailaspure 9/17/2025, 10:13 AM

- Marks\_Not\_Negative (Grade) – Marks cannot be negative.



## 2. Process Builder

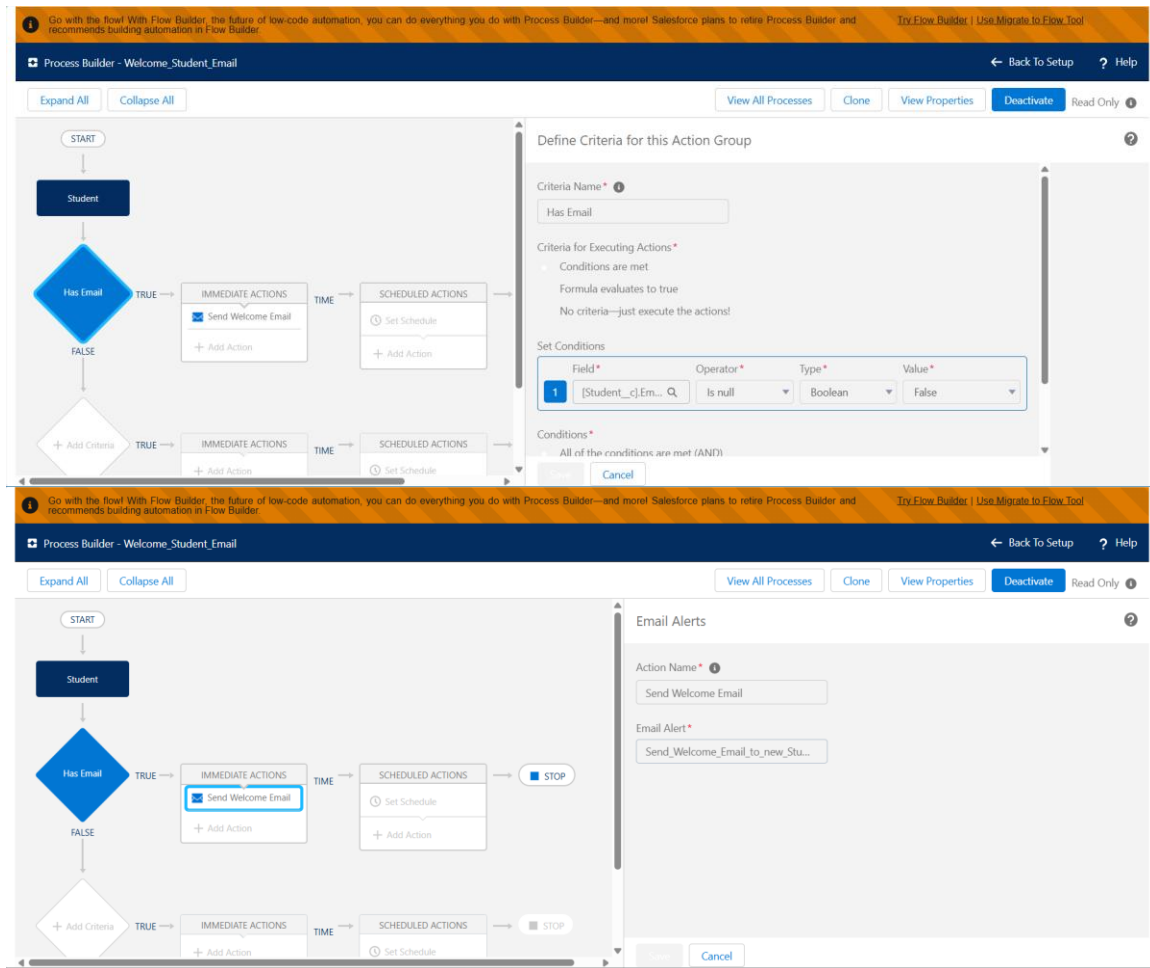
Process Builder was used to send a welcome email when a Student record is created.

Process Name: Welcome\_Student\_Email

Versions: All versions are documented with screenshots.

Steps:

1. Setup → Process Builder.
2. Click New → Enter Process Name.
3. Choose 'A record changes' as the trigger.
4. Select Object: Student.
5. Define Criteria: When record is created.
6. Add Action → Email Alert → Send Welcome Email.
7. Save & Activate.



### 3. Flow Builder

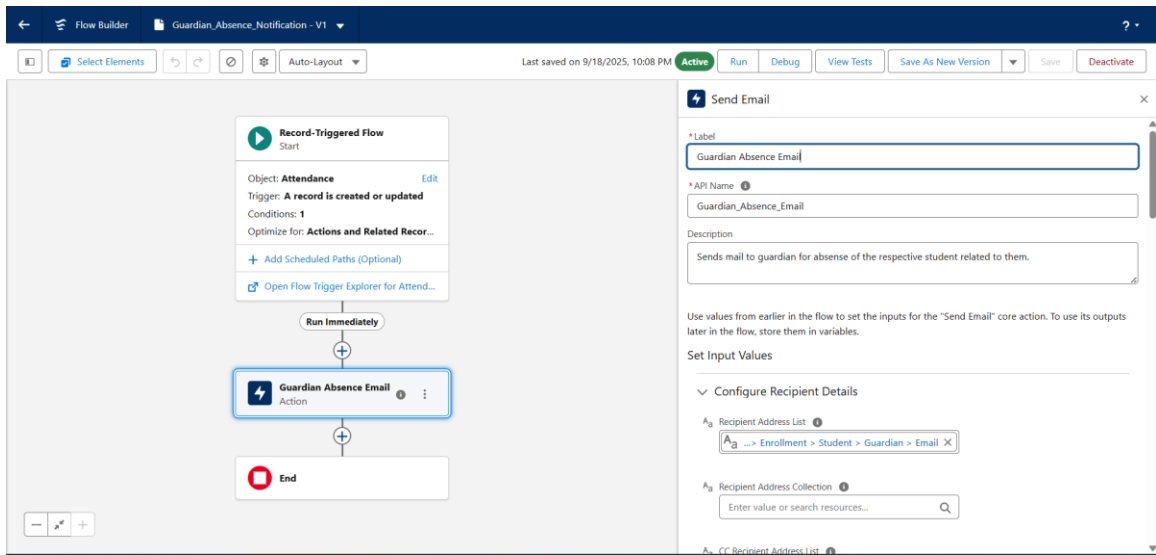
Flows were built to automate notifications for attendance and guardian communication.

Flows Created:

#### 1. Guardian\_Absence\_Notification (Autolaunched Flow)

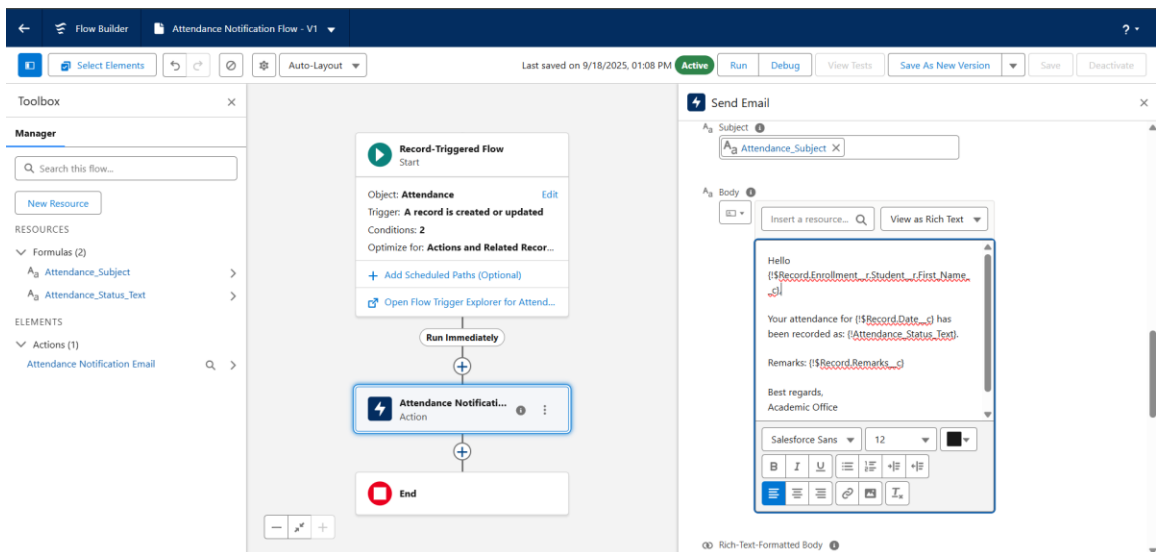
- Trigger: Attendance record created with Status = Absent.
- Action: Send Email to Guardian.





## 2. Attendance Notification Flow (Autolaunched Flow)

- Trigger: Attendance record created or updated.
- Action: Notify Student and Guardian via Email Alert.



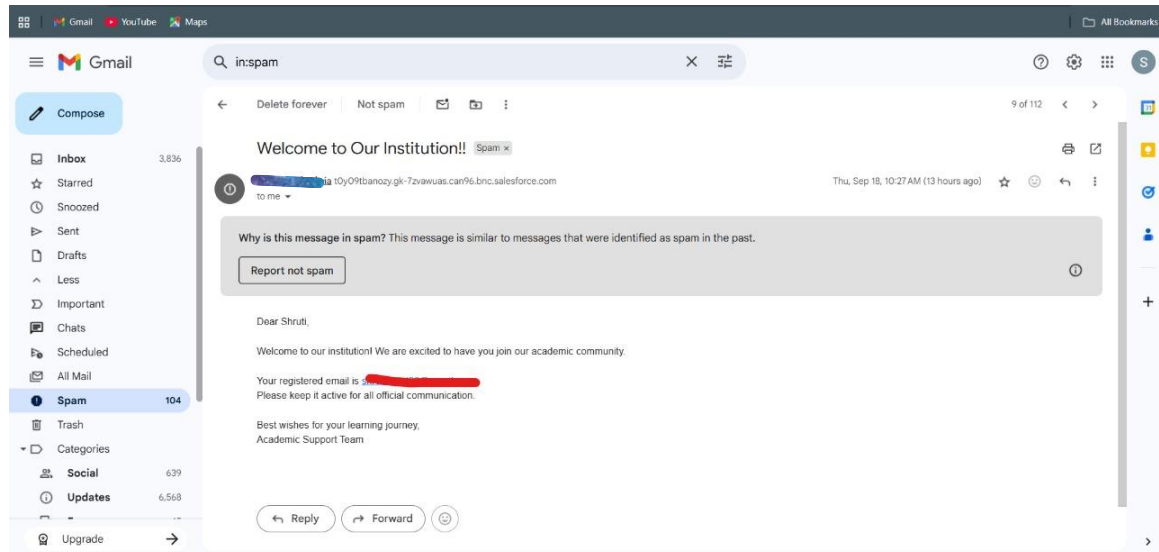
### Steps to Create a Flow:

1. Setup → Flow Builder.
2. Click New Flow → Select Record-Triggered Flow.
3. Choose Object: Attendance.
4. Define Entry Conditions (e.g., Status = Absent).
5. Add Action → Email Alert.
6. Save & Activate.

## 4. Email Alerts

Email Alerts were configured and linked to Process Builder and Flows. They will be shown in screenshots separately. Created alerts include:

- Student Welcome Email



- Attendance Update Notification Email

