**Phase 4 Report: Process Automation (Admin)**

**Project:** Phishing Awareness Training Tracker  
**Objective:** To layer intelligence and automation onto the data model, ensuring that failed phishing simulations automatically generate training assignments, employees/managers are notified, and overdue work is escalated. This phase moves the app from a static data store to an active training tracker.

**Validation Rules**

**Purpose:** To enforce data integrity and prevent logical errors in Assignments and Completions.

* **Assignment\_DueDate\_Not\_Past**  
  Prevents entering a due date in the past.

AND(

NOT(ISBLANK(Due\_Date\_\_c)),

Due\_Date\_\_c < TODAY()

)

*Outcome:* Keeps training schedules realistic.

* **Completion\_Must\_Have\_Links**  
  Prevents saving Completion records without linking both Employee and Assignment.

OR(

ISBLANK(Assignment\_\_c),

ISBLANK(Employee\_\_c)

)

*Outcome:* Ensures completions always tie back to training.

* **Assignment\_Status\_Lock**  
  Prevents editing records once marked as Completed.

AND(

ISCHANGED(Status\_\_c),

ISPICKVAL(PRIORVALUE(Status\_\_c), "Completed")

)

*Outcome:* Protects historical accuracy.

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**Flow Builder**

Flow Builder was the backbone of Phase 4. Three key Flows were built:

**1. Record-Triggered Flow: Auto-Create Assignment on Failed Simulation**

* **Trigger:** Simulation\_Result\_\_c created with Result\_\_c = 'Failed'.
* **Logic:**
  + Checks if Employee already has an open Assignment.
  + If not, creates a new Assignment (Status = Assigned, Due Date = Today+7).
  + Sends Email Alert to Employee & Manager.
  + Creates Task for Manager.
* **Outcome:** Failed simulations instantly result in training tasks, closing the loop.

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**2. Scheduled Flow: Reminders & Overdue Escalation**

* **Runs daily at 9 AM**.
* **Logic:**
  + Finds Assignments due in 2 days → sends reminder email.
  + Finds overdue Assignments → updates status to Overdue, sends Custom Notification to Manager, and creates a Task.
* **Outcome:** Ensures deadlines aren’t missed, with escalation if employees delay.

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**3. Screen Flow: Report Phishing Attempt**

* **Purpose:** Guided wizard for employees to report suspicious emails.
* **Steps:**
  + Capture subject, description, and optional screenshot.
  + Creates Simulation\_Result\_\_c with Result\_\_c = 'Reported'.
  + Sends alert to Security Team.
* **Outcome:** Encourages employees to actively report phishing, feeding into awareness metrics.

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**Email Alerts**

**Purpose:** Notify users who aren’t always logged into Salesforce.

* **Assignment Created Alert** → sent to Employee + Manager when a new assignment is created.
* **Reminder Alert** → sent 2 days before due date.
* **Overdue Escalation Alert** → sent to Manager for overdue assignments.

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**✔ Tasks**

**Purpose:** Ensure accountability through actionable to-dos.

* Created for Managers when Assignments are generated or become overdue.
* Subject Example: *“Review phishing training for John Doe”*.
* Appears on Manager’s homepage and task list.

**Custom Notifications**

**Purpose:** In-app/mobile push alerts for urgent issues.

* Sent to Manager when Assignment is overdue.
* Message Example: *“Assignment ‘Phishing Training – John Doe’ is overdue since 15 Sep.”*
* Clicking notification opens the record directly.

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**Conclusion**

Phase 4 successfully automated the most critical parts of the Phishing Awareness Training Tracker: failed simulations now trigger assignments, reminders ensure timely completion, overdue tasks are escalated, and managers have visibility. These automations transform the app into a responsive training tool that drives employee accountability and builds a culture of security awareness. In this phase, I implemented Salesforce declarative automation to enforce data quality, reduce manual work, and improve employee compliance with phishing training. Using **Validation Rules**, **Flow Builder**, **Email Alerts**, **Tasks**, and **Custom Notifications**, the system now auto-creates training assignments, enforces due dates, reminds users, and escalates overdue cases.