

## Phase 4: Process Automation (Admin)

**Goal:** Automate youth–job matching, interview scheduling, and email notifications, while ensuring data integrity.

### Step 1: Create Email Templates

1. Click **Setup** (⚙️) → In Quick Find, type **Email Templates** → Select **Email Templates**.
  2. Click **New Email Template** → Select **Lightning Email Template**.
  3. Fill details like **Name** and **Subject**, then design the email body.
  4. Save the template.
- **Welcome Email** → Sent after youth registration.

The screenshot shows the 'Classic Email Templates' setup page in Salesforce. The template is named 'welcome youth' and is currently disabled. The 'Email Template Detail' section shows it was created by 'korra.sunil.kumar' on 11/3/2025. The 'Email Template' section shows the subject 'Welcome to SkillMatch-Connect' and a preview of the email body, which includes a greeting, a thank you for registration, and a note about upcoming job notifications.

**Text Email Template**  
welcome youth

Preview your email template below.

**Email Template Detail** [Edit] [Delete] [Clone]

Email Templates from Salesforce	Unfiled Public Classic Email Templates	Available For Use	<input type="checkbox"/>
Email Template Name	welcome youth	Last Used Date	
Template Unique Name	welcome_youth	Times Used	
Encoding	Unicode (UTF-8)		
Author	korra.sunil.kumar [Change]		
Description			
Created By	korra.sunil.kumar, 11/3/2025, 8:42 PM	Modified By	korra.sunil.kumar, 11/3/2025, 8:42 PM

[Edit] [Delete] [Clone]

**Email Template** [Send Test and Verify Merge Fields]

**Subject** | Welcome to SkillMatch-Connect

**Plain Text Preview**

Hello YID-0043,

Thank you for registering with SkillMatch-Connect. Your Skills(Developer) are now recorded.  
We Will notify you when Your Skills Matching jobs are posted.

Regards,  
SkillMatch-Connect Team

- **Interview Scheduled Email** → Sent after youth is matched with a job and interview is created.

The screenshot shows the 'Classic Email Templates' setup page in Salesforce for an 'Interview' template. The template is currently disabled. The 'Email Template Detail' section shows it was created by 'korra.sunil.kumar' on 11/3/2025. The 'Email Template' section shows the subject 'Interview Scheduled' and a preview of the email body, which includes a greeting with a merge field, congratulations, and interview details with merge fields.

**Text Email Template**  
Interview

Preview your email template below.

**Email Template Detail** [Edit] [Delete] [Clone]

Email Templates from Salesforce	Unfiled Public Classic Email Templates	Available For Use	<input type="checkbox"/>
Email Template Name	Interview	Last Used Date	
Template Unique Name	Interview_scheduled	Times Used	
Encoding	Unicode (UTF-8)		
Author	korra.sunil.kumar [Change]		
Description			
Created By	korra.sunil.kumar, 11/3/2025, 8:55 PM	Modified By	korra.sunil.kumar, 11/3/2025, 8:55 PM

[Edit] [Delete] [Clone]

**Email Template** [Send Test and Verify Merge Fields]

**Subject** | Interview Scheduled

**Plain Text Preview**

Hello {{Interview\_\_c.Candidate\_Name\_\_c}},


Congratulations! You have been shortlisted for the {{Interview\_\_c.Job\_Title\_\_c}} position.

Your interview is scheduled on {{Interview\_\_c.Interview\_Date\_\_c}} {{Interview\_\_c.Interview\_Time\_Only\_\_c}}.

Please be prepared.

Best regards,  
SkillMatch-Connect

- **Interview Completed Email** → Sent after interview status is marked as Completed.



SETUP

Classic Email Templates

Text Email Template

Interview Complete

Preview your email template below.

Email Template Detail

EditDeleteClone

Email Templates from Salesforce	Unfilled Public Classic Email Templates	Available For Use	<input type="checkbox"/>
Email Template Name	Interview_Complete	Last Used Date	
Template Unique Name	Interview_Complete	Times Used	
Encoding	Unicode (UTF-8)		
Author	korra_sunil_kumar (Change)		
Description			
Created By	korra_sunil_kumar, 11/3/2025, 8:58 PM	Modified By	korra_sunil_kumar, 11/3/2025, 8:58 PM

EditDeleteClone

Email Template

Send Test and Verify Merge Fields

Subject

Interview Completed Scheduled

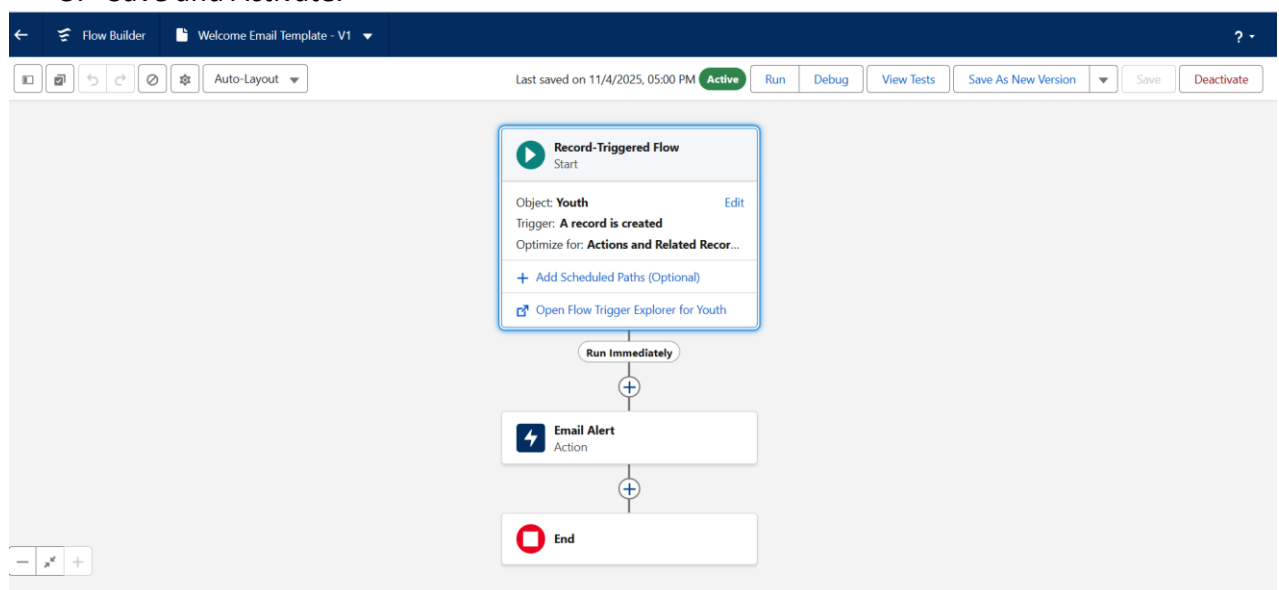
Plain Text Preview

Hello {{Interview\_\_c.Candidate\_Name\_\_c}},  
  
Your interview for {{Interview\_\_c.Job\_\_r.Name}} has been successfully marked as Completed.  
  
Result: {{Interview\_\_c.Result\_\_c}}  
  
Thank you for attending.  
  
Best regards,  
SKIMatch-Connect

## Step 2: Build Flows

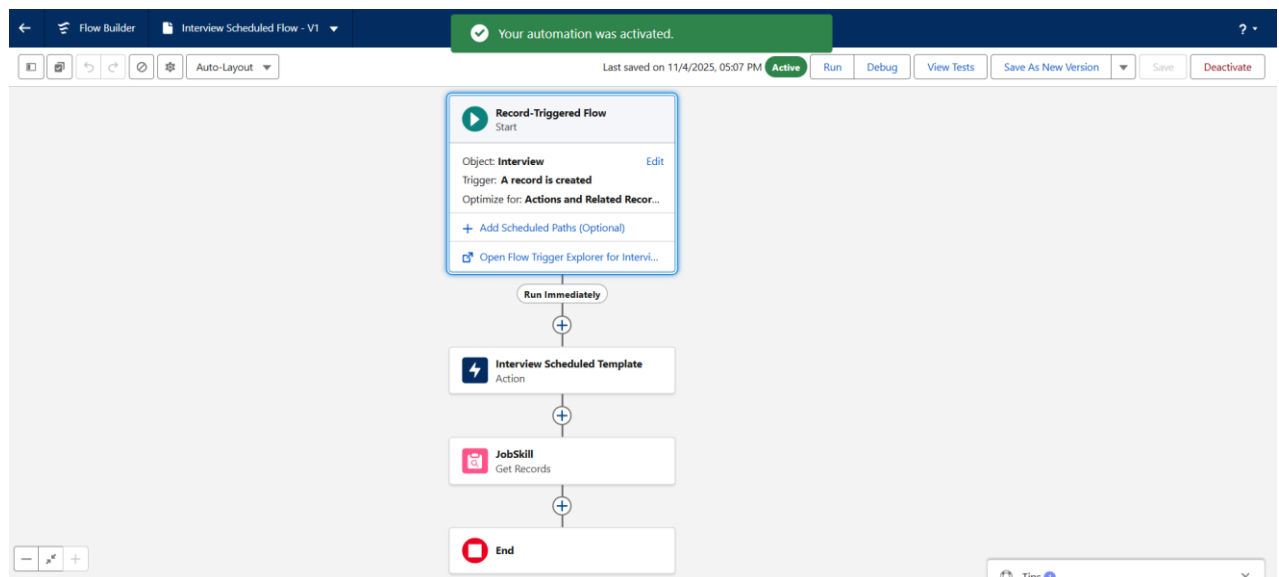
## 1. Welcome Email Flow (After Registration)

1. Click **Setup** (⚙️) → Quick Find → **Flows** → **New Flow**.
2. Select **Record-Triggered Flow**.
3. Choose **Object: Youth\_\_c** → Trigger: **When record is created** → **After Save**.
4. Add **Action** → **Send Email** → Select **Welcome Email Template**.
5. Save and Activate.



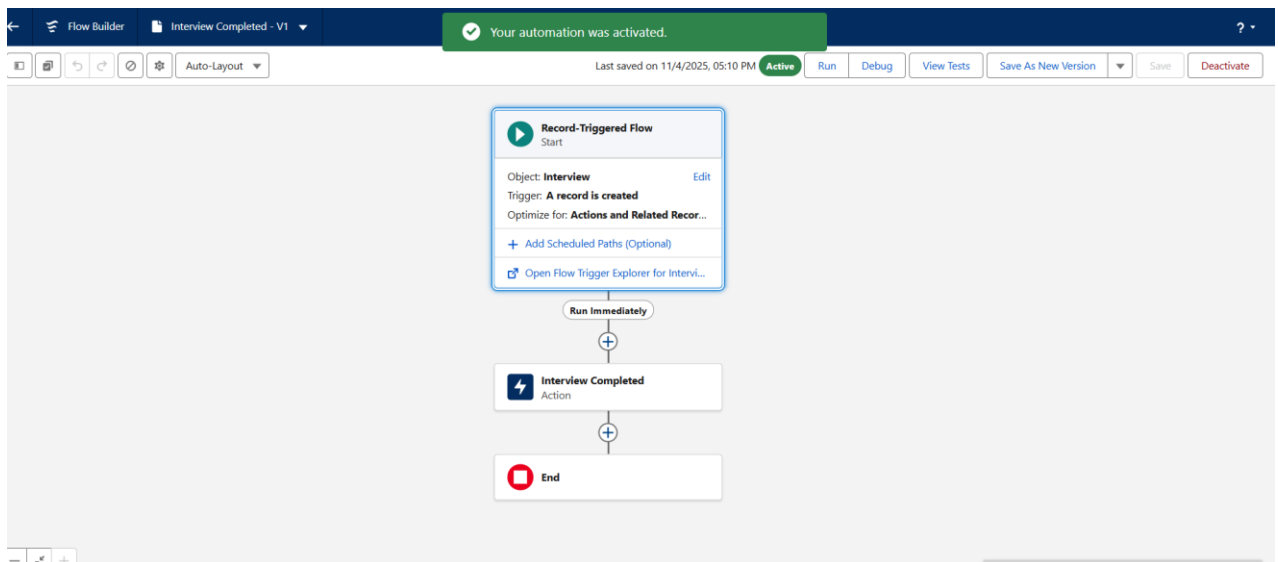
## 2. Interview Scheduled Flow (After Match & Scheduling)

1. Click **Setup** → **Flows** → **New Flow**.
2. Select **Record-Triggered Flow** → **Object: Job\_\_c** → Trigger: **Created or Updated** → **After Save**.
3. Add **Get Records** → **JobSkill\_\_c** (fetch required skills).
4. Add **Get Records** → **YouthSkill\_\_c** (find youth with matching skills).
5. Add **Loop** → For each Youth, **Create Interview\_\_c record** (Candidate, Job, Status = Scheduled, Date).
6. Add **Action** → **Send Email** → Select **Interview Scheduled Template**.
7. Save and Activate.



## 3. Interview Completed Flow (After Interview Completion)

1. Click **Setup** → **Flows** → **New Flow**.
2. Select **Record-Triggered Flow** → **Object: Interview\_\_c**.
3. Trigger: **When record is updated** → **After Save**.
4. Add **Decision Element** → Condition: **Status\_\_c = Completed**.
5. Add **Action** → **Send Email** → Select **Interview Completed Template**.
6. Save and Activate.



### Step 3: Add Validation Rules

1. Click **Setup** → **Object Manager** → **Youth\_\_c** → **Validation Rules** → **New**.
2. Create Rule: **Email Required**
  - Formula: ISBLANK(Email\_\_c)
  - Error: "Email is required."

Object Manager interface showing the 'Youth Validation Rule' configuration. The rule is named 'Email\_Required', is active, and has the formula 'ISBLANK(\$User.Email)'. The error message is 'Email is required.' and the error location is 'Top of Page'. The rule was created by 'korra\_sunil\_kumar' on 11/4/2025 at 3:49 AM.

Validation Rule Detail		Edit		Clone	
Rule Name	Email_Required	Active	✓		
Error Condition Formula	ISBLANK(\$User.Email)				
Error Message	Email is required.	Error Location	Top of Page		
Description					
Created By	korra_sunil_kumar: 11/4/2025, 3:49 AM	Modified By	korra_sunil_kumar: 11/4/2025, 3:49 AM		

### 3. Create Rule: **Location Required**

- Formula: ISBLANK(Location\_\_c)
- Error: “Location is required.”

#### Youth Validation Rule

[Back to Youth](#) [Help for this Page](#)

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

Rule Name	Location_Required	Active	✓
Error Condition Formula	ISBLANK(Location__c)		
Error Message	Location is required.	Error Location	Top of Page
Description	Youth Validation Rule ~ Salesforce - Developer Edition Location		
Created By	<a href="#">Youth Coordinator</a> 9/13/2025, 9:15 AM	Modified By	<a href="#">Youth Coordinator</a> 9/13/2025, 9:15 AM

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