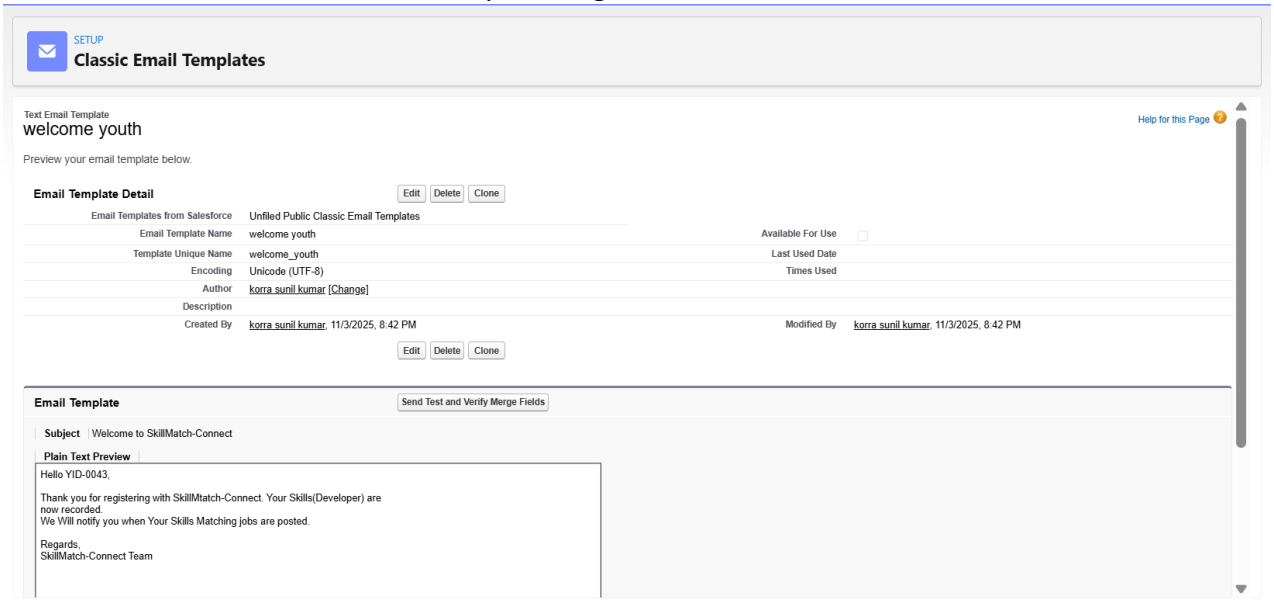
Phase 4: Process Automation (Admin)

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

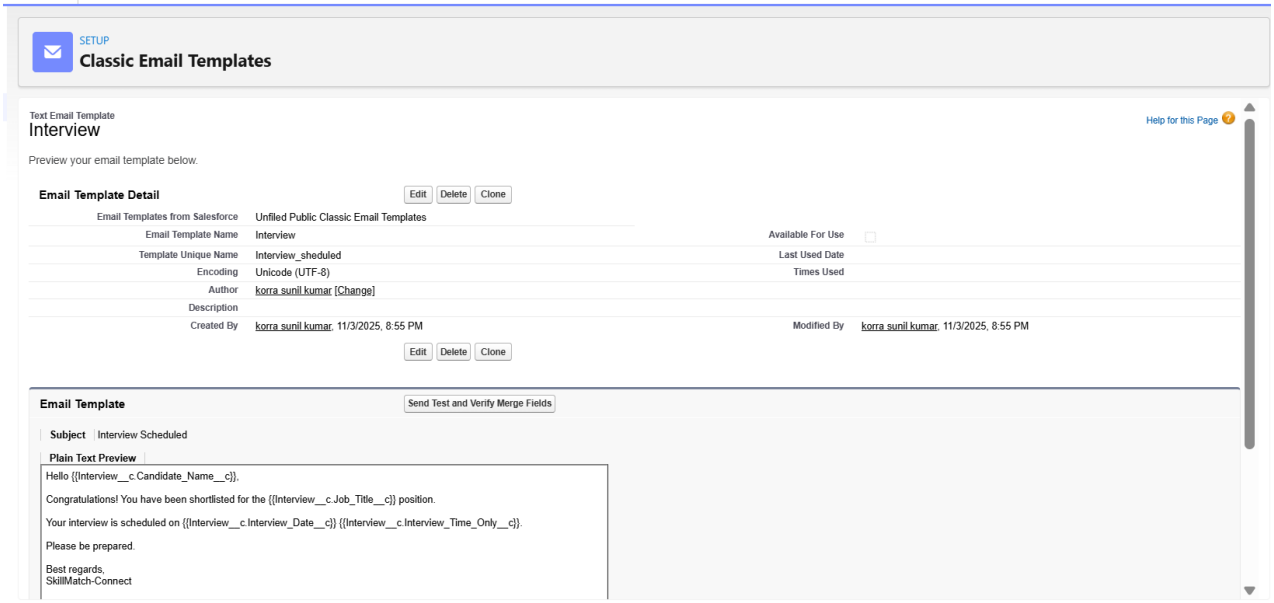
Step 1: Create Email Templates

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.

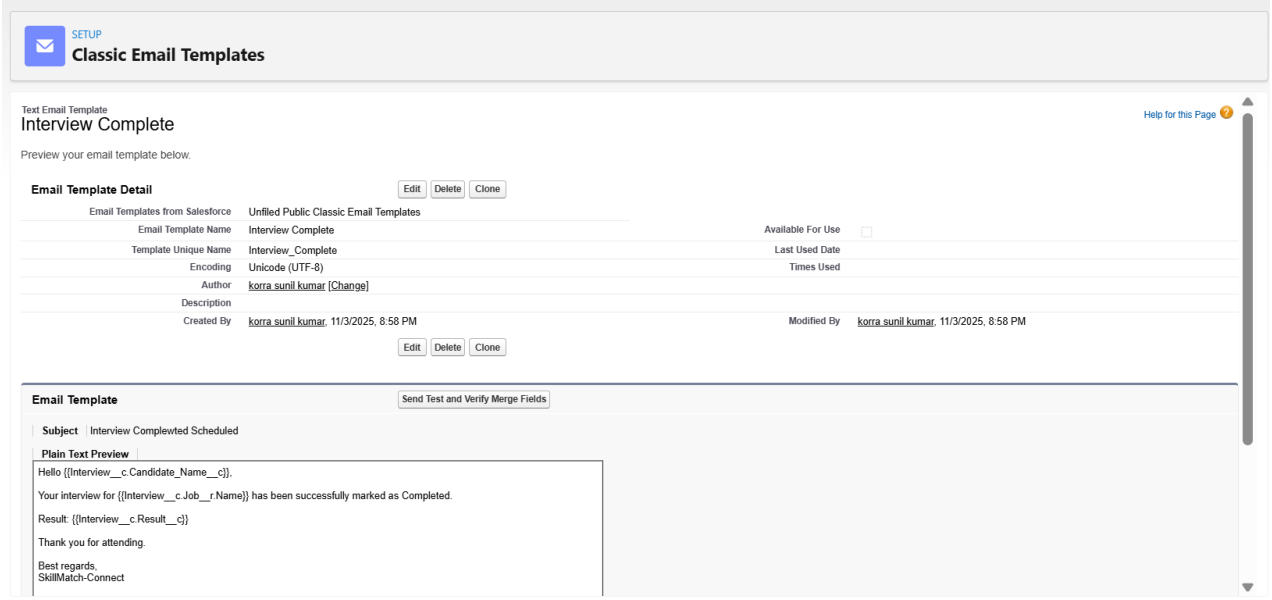
- **Welcome Email** → Sent after youth registration.



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



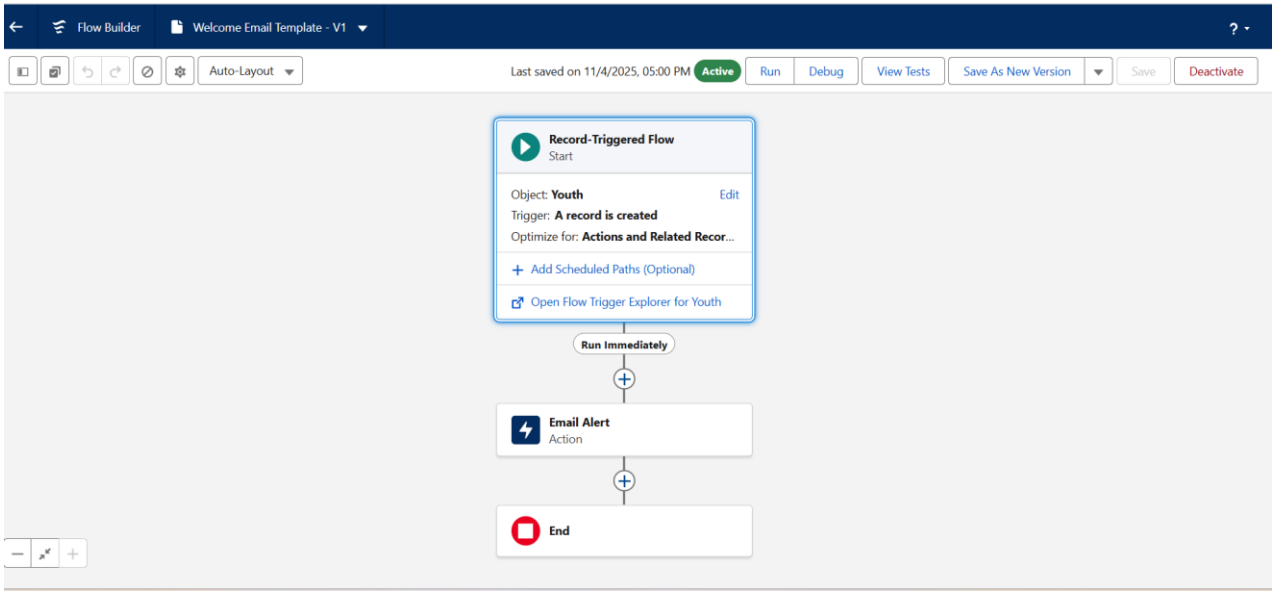
- **Interview Completed Email** → Sent after interview status is marked as Completed.



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.



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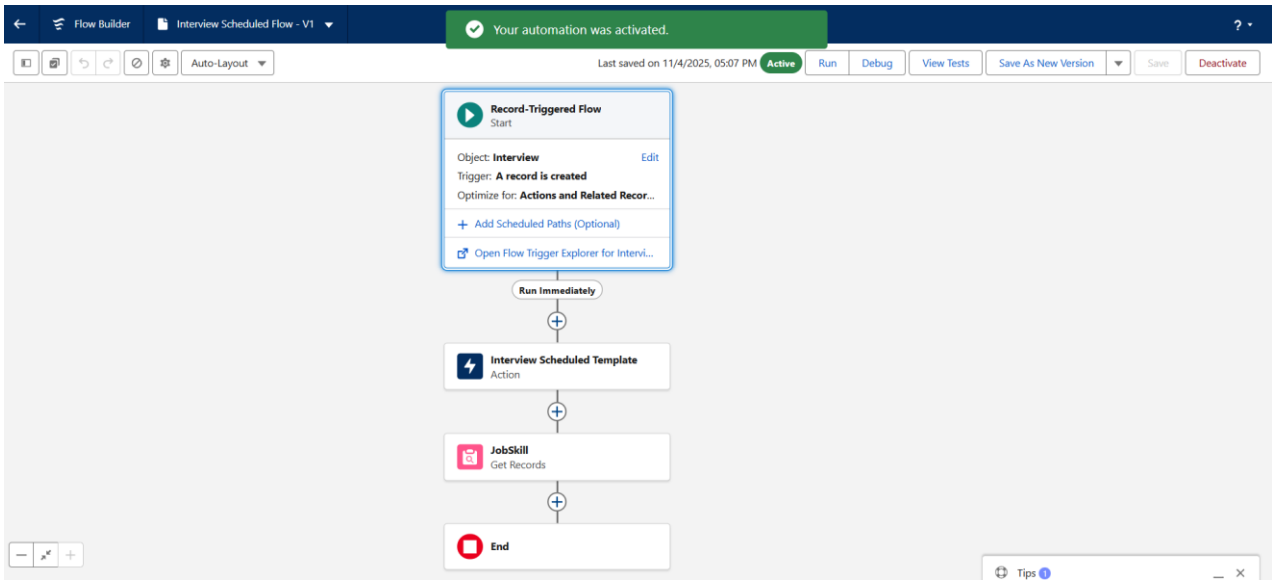
2. Interview Scheduled Flow (After Match & Scheduling)

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.



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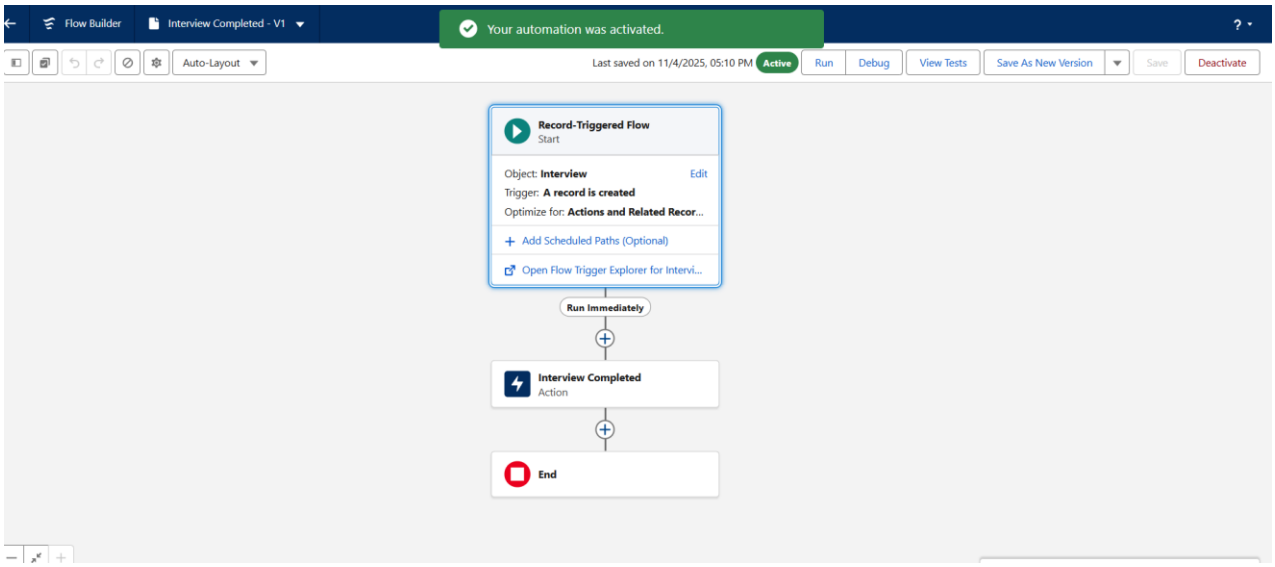
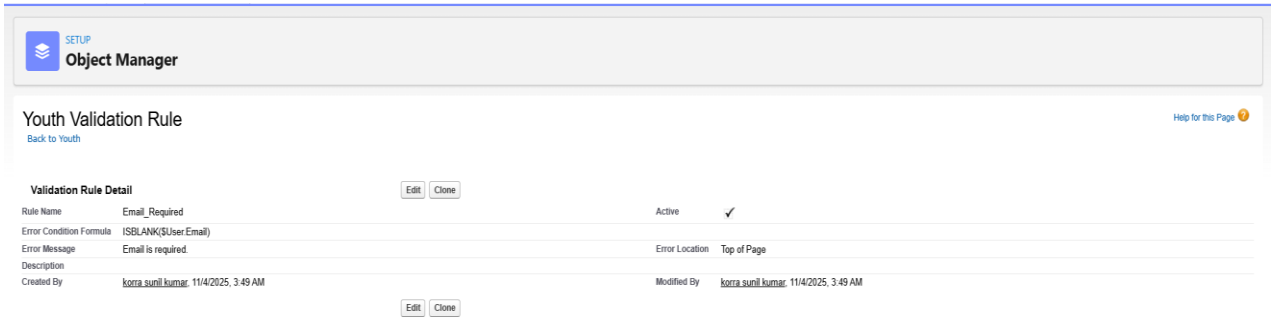
3. Interview Completed Flow (After Interview Completion)

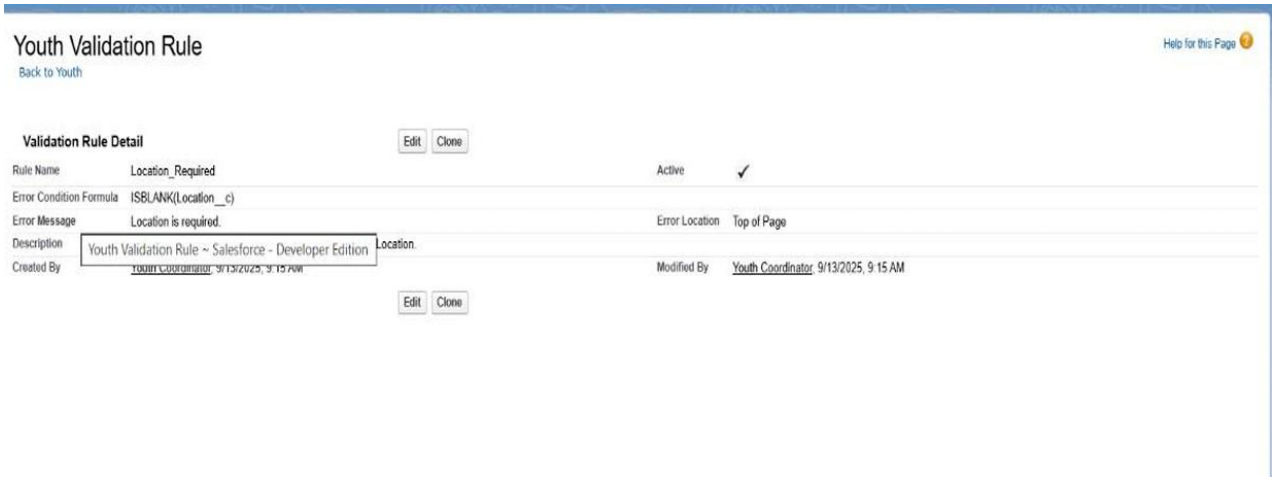
1. Click **Setup → Flows → New Flow**.
2. Select **Record-Triggered Flow** → **Object: Interview__c**.
3. Trigger: **When record is updated → After Save**.
4. Add **Decision Element** → Condition: Status__c = Completed.
5. Add **Action → Send Email** → Select **Interview Completed Template**.
6. Save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



3. Create Rule: **Location Required**

- Formula: ISBLANK(Location__c)
- Error: “Location is required.”