

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' page in Salesforce. A specific template named 'welcome_youth' is selected. The 'Email Template Detail' section displays the following information:

Email Template from Salesforce	Unfiled Public Classic Email Templates
Email Template Name	welcome_youth
Template Unique Name	welcome_youth
Encoding	Unicode (UTF-8)
Author	korra.sunil.kumar [Change]
Description	
Created By	korra.sunil.kumar, 11/3/2025, 8:42 PM

Below the detail section is the 'Email Template' preview area, which includes the subject line 'Welcome to SkillMatch-Connect' and the plain text preview content:

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' page in Salesforce. A specific template named 'Interview' is selected. The 'Email Template Detail' section displays the following information:

Email Template from Salesforce	Unfiled Public Classic Email Templates
Email Template Name	Interview
Template Unique Name	Interview_sheduled
Encoding	Unicode (UTF-8)
Author	korra.sunil.kumar [Change]
Description	
Created By	korra.sunil.kumar, 11/3/2025, 8:55 PM

Below the detail section is the 'Email Template' preview area, which includes the subject line 'Interview Scheduled' and the plain text preview content:

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.

The screenshot shows the 'Classic Email Templates' section in Salesforce. A specific template named 'Interview Complete' is selected. The 'Email Template Detail' pane shows the following information:

- Email Template Name: Interview Complete
- Template Unique Name: Interview_Complete
- Encoding: Unicode (UTF-8)
- Author: korra sunil kumar [Change]
- Description: korra sunil kumar
- Created By: korra sunil kumar, 11/3/2025, 8:58 PM
- Modified By: korra sunil kumar, 11/3/2025, 8:58 PM

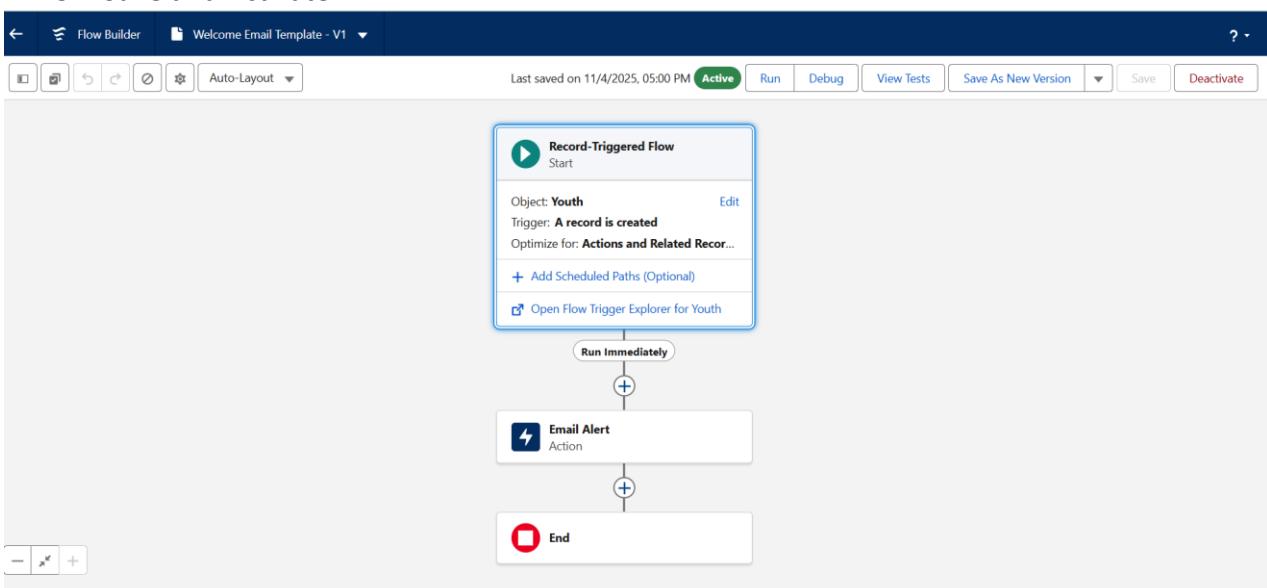
The 'Available For Use' checkbox is unchecked. Below this, the 'Plain Text Preview' pane displays the email content:

```
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,  
SkillMatch-Connect
```

Step 2: Build Flows

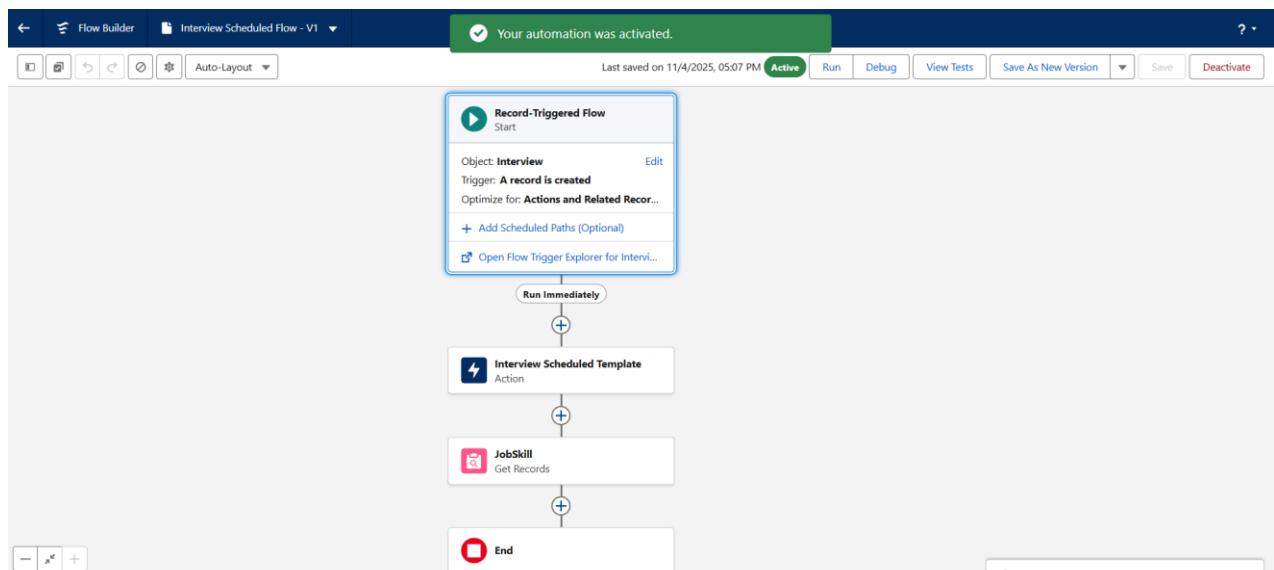
1. Welcome Email Flow (After Registration)

1. Click **Setup** (gear icon) → 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.



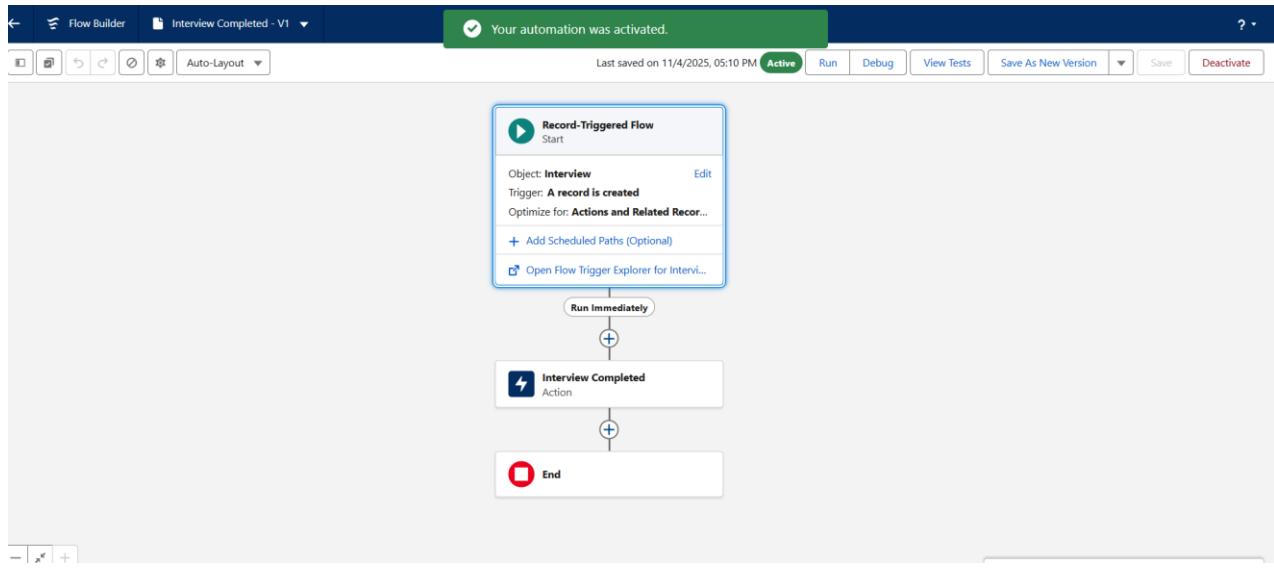
2. Interview Scheduled Flow (After Match & Scheduling)

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**
 - o Formula: ISBLANK(Email__c)
 - o Error: “Email is required.”

Validation Rule Detail	
Rule Name	Email_Required
Error Condition Formula	ISBLANK(\$User.Email)
Error Message	Email is required.
Description	
Created By	korra sunil kumar 11/4/2025, 3:49 AM
Modified By	korra sunil kumar 11/4/2025, 3:49 AM
Edit Clone	

3. Create Rule: Location Required

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

Youth Validation Rule Help for this Page ⓘ

[Back to Youth](#)

Validation Rule Detail

Rule Name	Location_Required	Edit Clone	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	YOUTH COORDINATOR 9/13/2025, 9:15 AM	Modified By	Youth Coordinator 9/13/2025, 9:15 AM

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

