

Phase 4 Report

Automation & Business Logic

Project: College Placement & Internship Management System

Batch: 4

Program: TCS Last Mile SmartBridge

Prepared by: Lowrence Devu

1. Introduction

This phase focuses on automating business processes within Salesforce to reduce manual effort and ensure data consistency. Automation tools such as Flows, Validation Rules, Approval Processes, and Notifications were implemented to streamline placement and internship management.

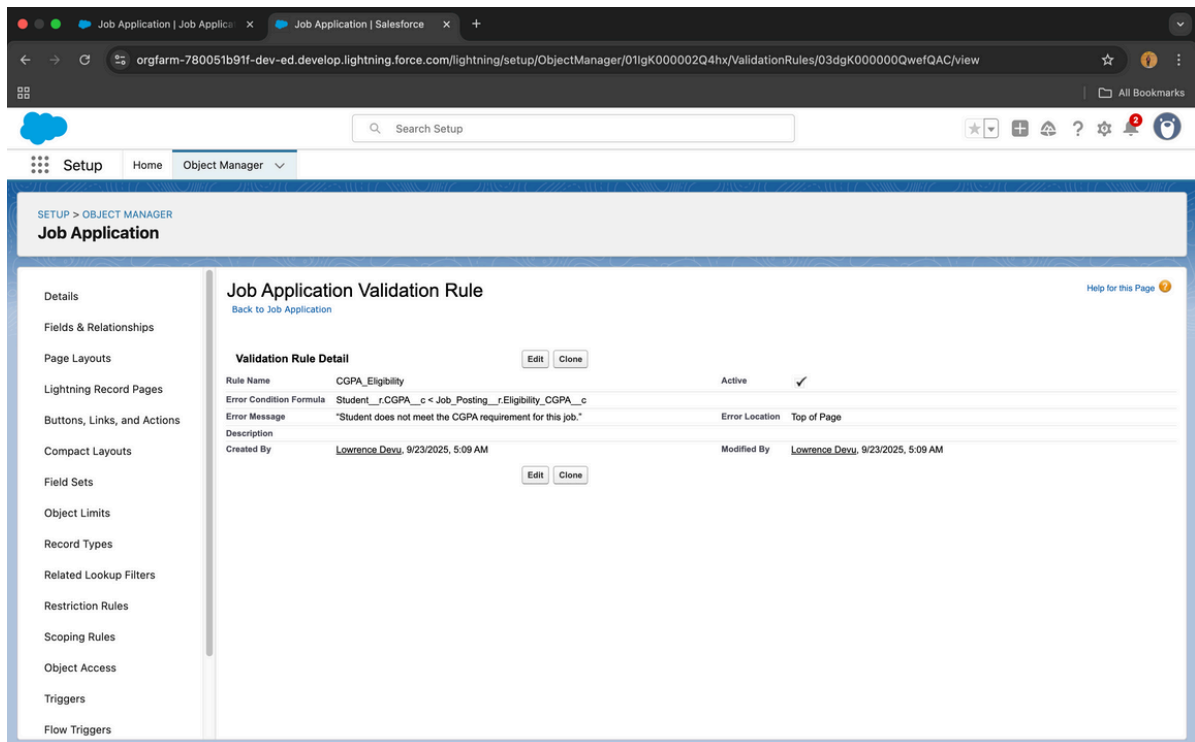
2. Objectives

- Automate student application submission and status updates.
- Validate input data with rules (e.g., minimum CGPA for eligibility).
- Implement approval workflows for shortlisting and selections.
- Enable email alerts and notifications to stakeholders.
- Ensure automation aligns with business requirements.

3. Steps Performed

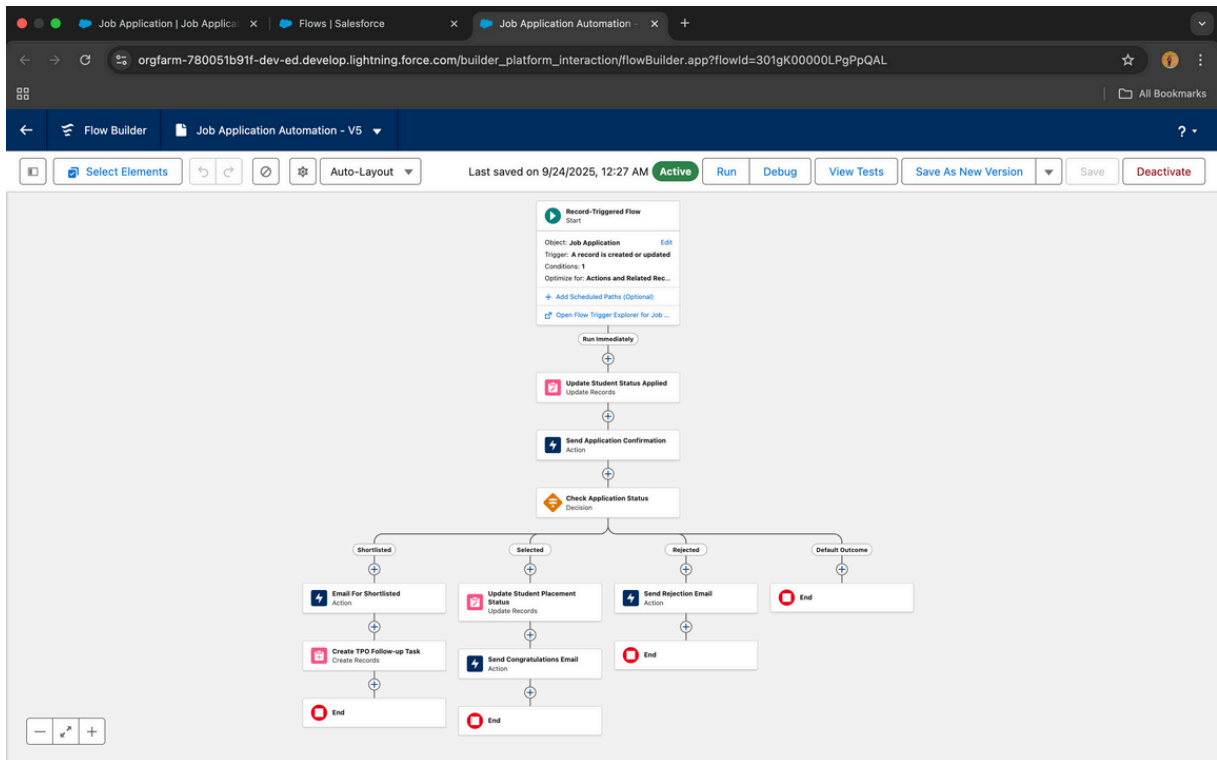
3.1 Validation Rules

- Created validation on **Application**:
 - CGPA must be greater than or equal to eligibility criteria in Job Posting.
 - Application Date cannot be earlier than Job Posting Date.



3.2 Record-Triggered Flows

- Built a **Before-Save Flow**:
 - Auto-populates Application Date with today’s date.
- Built an **After-Save Flow**:
 - When Application Status = “Selected”, update Student Placement Status = “Selected”.
 - When Application Status = “Rejected”, update Student Placement Status = “Rejected”.



3.3 Approval Process

- Approval process for **Job Applications**:
 - Step 1: Recruiter reviews application.
 - Step 2: Placement Officer gives final approval.
 - Status auto-updated upon approval/rejection.

The screenshot shows the 'Approval Processes' setup page in Salesforce. The process being configured is 'Job Application: Job Application Shortlisting'. The process definition details are as follows:

Field	Value
Process Name	Job Application Shortlisting
Unique Name	Job_Application_Shortlisting
Description	
Entry Criteria	Job Application: Status EQUALS Applied
Record Editability	Administrator ONLY
Approval Assignment Email Template	
Initial Submitters	Job Application Owner
Created By	Lawrence Devu, 9/25/2025, 1:06 AM
Modified By	Lawrence Devu, 9/25/2025, 1:09 AM

Initial Submission Actions:

Action	Type	Description
Record Lock	Record Lock	Lock the record from being edited
Task	Task	Follow Up the Student who has been shortlisted
Email Alert	Email Alert	Get a email alert

Approval Steps:

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
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Approval Processes

Initial Submission Actions

Action	Type	Description
Edit Remove	Record Lock	Lock the record from being edited
Edit Remove	Task	Follow Up the Student who has been shortlisted
Edit Remove	Email Alert	Get a email alert

Approval Steps

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
Show Actions Edit Del	1	Step 1			User.TPO_1	Final Rejection

Final Approval Actions

Action	Type	Description
Edit	Record Lock	Lock the record from being edited

Final Rejection Actions

Action	Type	Description
Edit	Record Lock	Unlock the record for editing

Recall Actions

Action	Type	Description
Edit	Record Lock	Unlock the record for editing

[Back To Top](#) Always show me [more](#) records per related list

3.4 Email Alerts & Notifications

- Configured Email Alerts:
 - Notify Student when Application Status changes.
 - Notify Recruiter when new Application is submitted.
- Configured In-App Notifications for real-time updates.

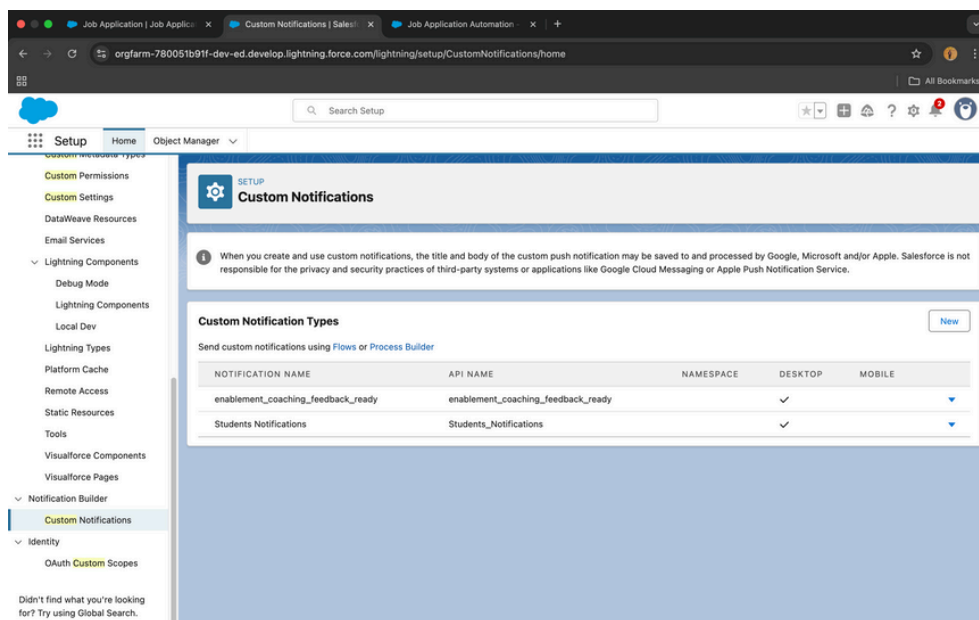
Email Alerts

All Email Alerts

Email alerts are used to send emails from a flow or other automation.

View: [All Email Alerts](#) | [Create New View](#)

Action	Description	Email Template Name	Object	Last Modified Date
Edit Del	Get a email alert when Rejected	Application Rejected	Job Application	9/25/2025
Edit Del	Get a email alert when shortlisted	Interview Scheduled	Job Application	9/25/2025
Edit Del	Get a email alert	Application Received	Job Application	9/25/2025
Edit Del	Get a email alert when selected	Congratulation Email	Job Application	9/25/2025



3.5 Scheduled Automation

- Scheduled Flow to send reminders to students about upcoming deadlines.
- Runs daily at 9:00 AM.

4. Expected Outcomes

- Reduced manual effort with automated data updates.
- Enforced CGPA eligibility rules.
- Approval process ensures structured application review.
- Real-time communication via emails and notifications.
- Increased system reliability and user efficiency.

5. Conclusion

Phase 4 successfully automated the business logic for the College Placement & Internship Management System. With validation rules, flows, approval processes, and email alerts, the system now ensures accuracy, transparency, and timely updates. This establishes a foundation for Phase 5, which will focus on advanced reporting and dashboards.