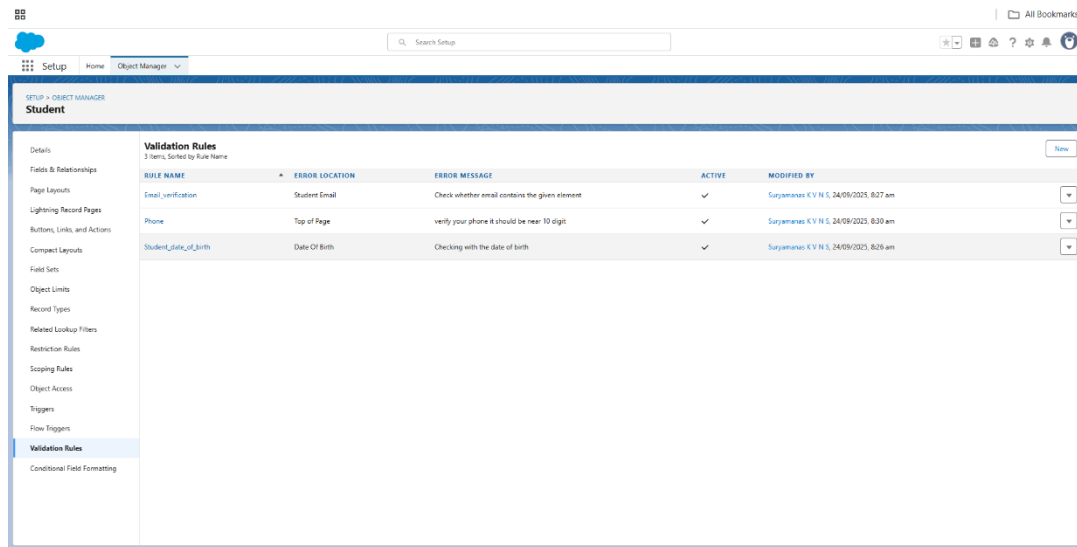


# University School Management — Phase 4: Process Automation

**Goal:** Automate manual steps such as **validation, reminders, approvals, and notifications** so student records, registrations, and events move automatically without human follow-ups.

## Validation Rules

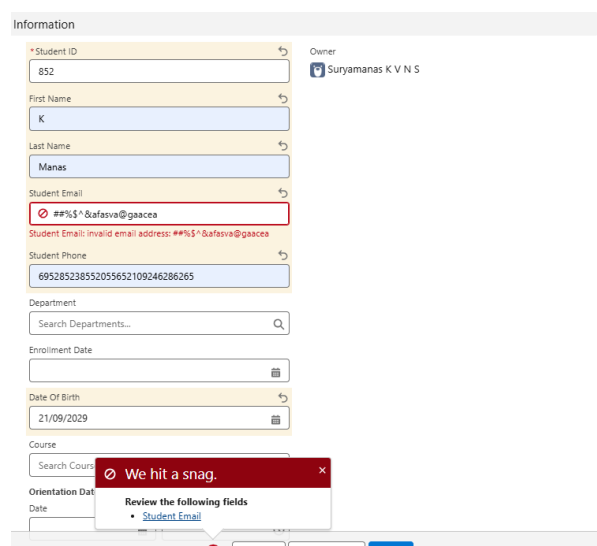
- A validation rule created on the **Student** object to ensure **Registration Date** is always in the future and to prevent invalid data such as missing or incorrectly formatted email or phone numbers.
- This prevents admins or staff from entering incorrect student data and improves data accuracy.



The screenshot shows the 'Validation Rules' configuration page for the 'Student' object. The page has a sidebar with navigation options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, Scoping Rules, Object Access, Triggers, Flow Triggers, Validation Rules (selected), and Conditional Field Formatting. The main content area displays a table of validation rules.

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Email_verification	Student Email	Check whether email contains the given element	✓	Suryamas K V N S, 24/09/2025, 8:27 am
Phone	Top of Page	verify your phone it should be near 10 digit	✓	Suryamas K V N S, 24/09/2025, 8:30 am
Student_date_of_birth	Date Of Birth	Checking with the date of birth	✓	Suryamas K V N S, 24/09/2025, 8:26 am

Fig.1 ValidationRules



The screenshot shows a student record form with the following fields: Student ID (852), First Name (K), Last Name (Manas), Student Email (invalid email address: ##%\$\* &afasva@gaaacea), Student Phone (695285238552055652109246286265), Department (Search Departments...), Enrollment Date, Date Of Birth (21/09/2029), Course (Search Course...), and Orientation Date. A red error message is displayed: "We hit a snag. Review the following fields: Student Email".

Fig.2 ValidationRules Testing

- **Email Templates for Automation**

- Two classic email templates were created and stored under Private Email Templates:  
**ET\_Student\_Registration\_Confirmation** – sends a confirmation email to the student immediately after registration is completed.

The screenshot shows the 'ET Student Registration Confirmation' email template in the University Manager interface. The template is categorized as a 'Public Email Template'. The message content includes a personalized greeting, a reminder about orientation at Pragen College, and a list of details: Student ID, Course Enrolled, Student Email, Orientation Date & Time, and Location. It also includes a note to arrive on time and a sign-off from Pragen College Student Services.

Information	
Email Template Name	ET Student Registration Confirmation
Description	
Made in Email Template Builder	<input type="checkbox"/>
Related Entity Type	Student
Folder	Public Email Templates

**Message Content**

Subject: Enhanced Letterhead

HTML Value:

Hello {{{Student\_c\_First\_Name\_c}}} {{{Student\_c\_Last\_Name\_c}}}

This is a friendly reminder regarding your upcoming orientation at Pragen College.

Here are the details:

Student ID: {{{Student\_c\_Name}}}  
 Course Enrolled: {{{Student\_c\_Course\_c}}}  
 Student Email: {{{Student\_c\_Student\_Email\_c}}}  
 Orientation Date & Time: {{{Student\_c\_Orientation\_Date\_Time\_c}}}  
 Location: {{{Student\_c\_Location\_c}}}

Please ensure you arrive or log in on time to make the most of your first day with us.

Best regards,  
 Pragen College Student Services

**Additional Information**

Created By: Suryamas K V N S, 23/09/2025, 4:14 pm  
 Last Modified By: Suryamas K V N S, 23/09/2025, 4:23 pm

**Fig.3 ET Student Registration Confirmation Template**

- **ET\_Student\_Welcome** – sends a welcome email to the student with orientation details, college guidelines, or important first-day instructions.

The screenshot shows the 'ET Student Welcome' email template in the University Manager interface. The template is categorized as a 'Private Email Template'. The message content includes a personalized greeting, a welcome message from Pragen College, a list of next steps (log in, check orientation schedule, explore resources), and a sign-off from Pragen College Student Services.

Information	
Email Template Name	ET Student Welcome
Description	
Made in Email Template Builder	<input type="checkbox"/>
Related Entity Type	Student
Folder	Private Email Templates

**Message Content**

Subject: Enhanced Letterhead

HTML Value:

Hello {{{Student\_c\_First\_Name\_c}}} {{{Student\_c\_Last\_Name\_c}}},

Welcome to Pragen College! 🎓 We are thrilled to have you join our community of learners.

Here are a few things to get you started:

Student ID: {{{Student\_c\_Name}}}  
 Course: {{{Student\_c\_Course\_c}}}  
 Enrollment Date: {{{Student\_c\_Enrollment\_Date\_c}}}

**Next Steps:**

1. Log in to your student portal with the credentials sent separately.
2. Check your orientation schedule under "My Courses."
3. Explore available student resources and support services.

We look forward to supporting you every step of the way in your academic journey.

Best regards,  
 Pragen College Student Services

**Additional Information**

Created By: Suryamas K V N S, 23/09/2025, 4:15 pm  
 Last Modified By: Suryamas K V N S, 23/09/2025, 4:20 pm

**Fig.4 ET Student Welcome Template**

### Flow for Appointment Confirmation

- A record-triggered flow “Student\_Registration\_Flow” built on the Student object:
- Trigger: When a student record is created or when Status changes to “Registered.”
- Action:
- Update a “Registration Confirmed” checkbox on the Student record.
- Send the ET\_Student\_Registration\_Confirmation email template to the student’s email.

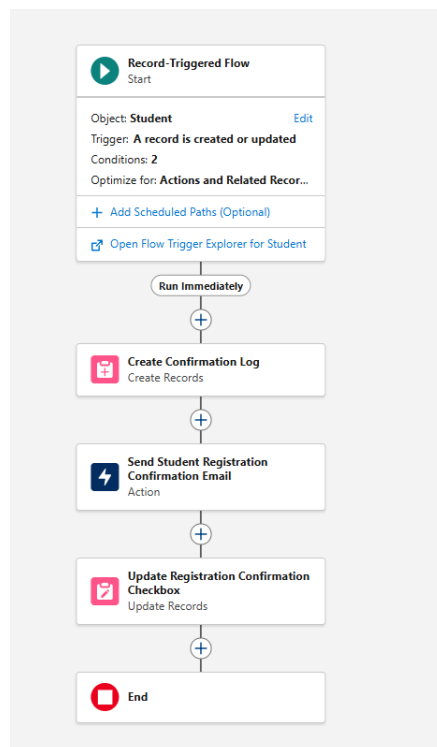


Fig.5 Student Confirm Flow

## Flow for Student Registration Confirmation

A record-triggered flow “Student Registration Confirm” built on the Student object:

- **Trigger:** When a student record is created or when Status changes to “Registered.”
- **Action:**
  - Update a “Registration Confirmed” checkbox on the Student record.
  - Send the ET\_Student\_Registration\_Confirmation email template to the student’s email.

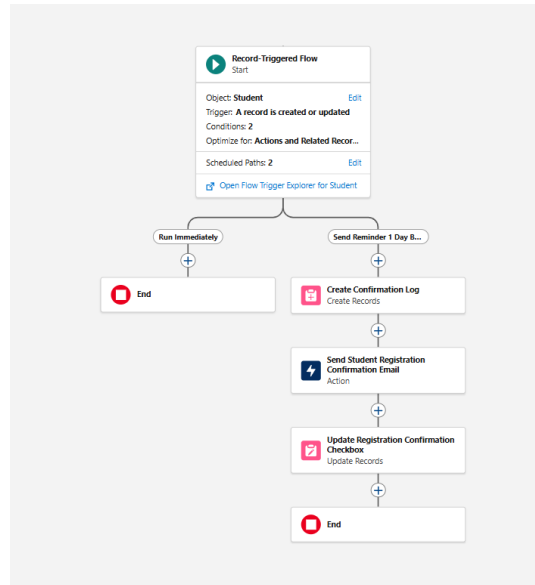


Fig.6 Student Registration Reminder Flow

## Quick Action – “Mark Registration as Completed”

A Quick Action added on the **Student** object:

- **Action Type:** Update a Record
- **Predefined Field Values:**
  - **Field:** Registration Stage (Registration\_Stage\_\_c)
  - **Value:** “Completed”
- **Placement:** Added to the **Student page layout** to allow one-click completion of student registrations.

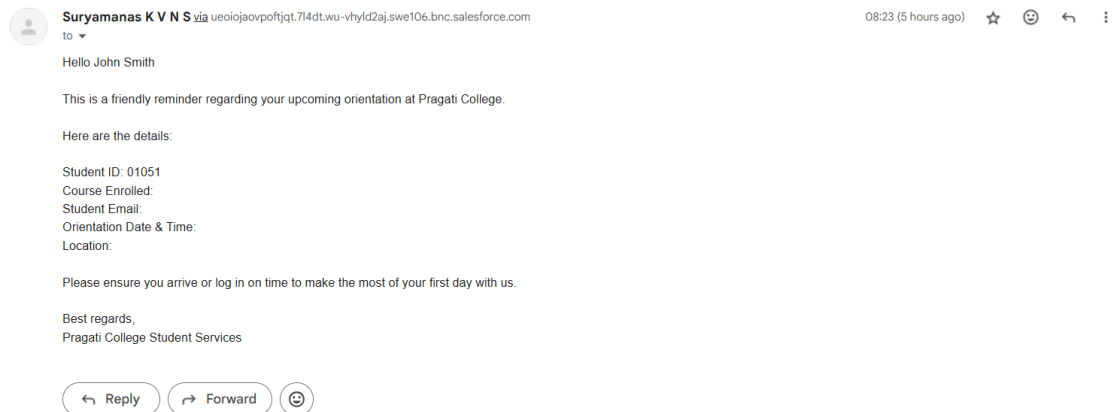
Field	Value
Registration Stage	Completed

Fig.7 Mark Registration as Completed

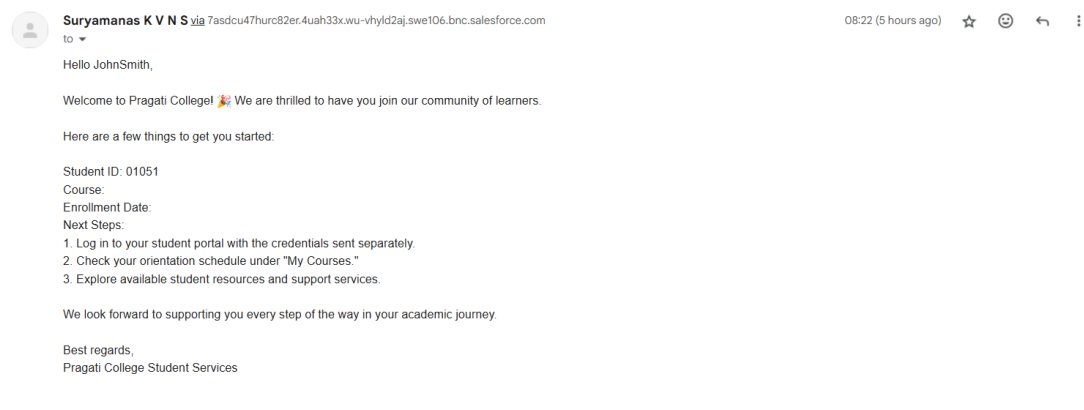
## Testing & Results

Sample student registrations were created to test the automation:

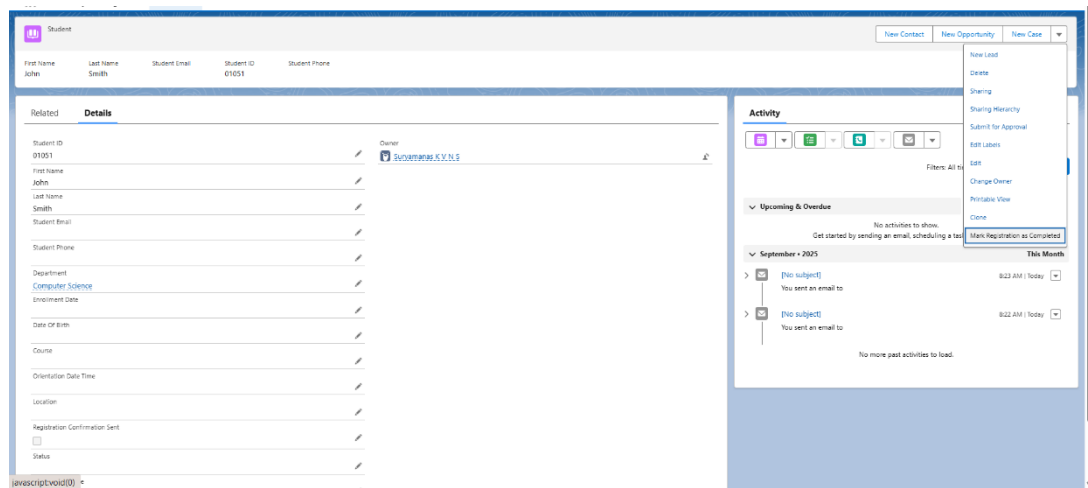
- **Admin/Receptionist creates Student Registration** → Student immediately receives **Registration Confirmation email**.
- **Day before Orientation/Deadline** → Student receives **Welcome/Reminder email**.
- **Quick Action “Mark Registration as Completed”** → Updates **Registration Stage** to “Completed” with one click.



**Fig.8** [ET Student Registration Confirmation Email](#)



**Fig.9** [ET Student Welcome Email](#)



**Fig 10. Mark Registration as Completed in app launcher**