

Phase 4: Process Automation (Admin)

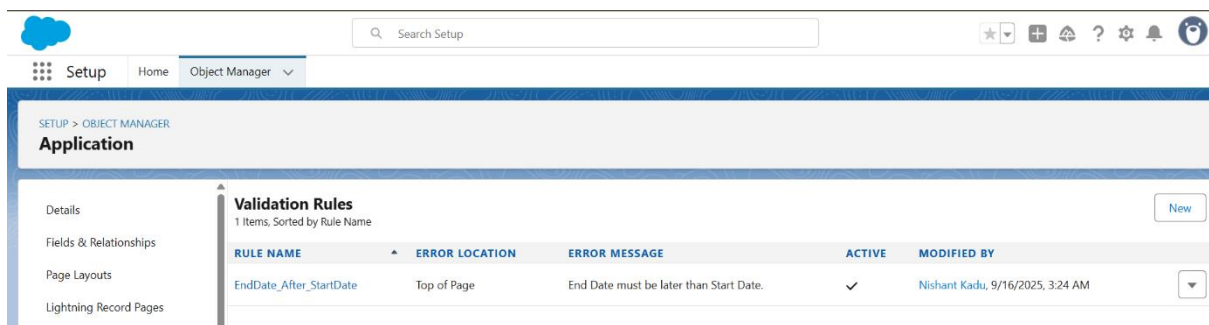
Goal: Automate repetitive tasks, enforce business rules, and streamline workflows.

This ensures accuracy in applications, faster approvals, and better communication.

It reduces manual effort and improves overall efficiency in the system.

1. Validation Rules

- Validation Rules ensure data accuracy by restricting invalid entries.
 - Example: On *Application__c*, the *End Date* must be after the *Start Date*.
 - Formula: `End_Date__c < Start_Date__c`
 - Error Message: “*End Date must be later than Start Date.*”



The screenshot shows the Salesforce Setup interface. The breadcrumb trail is: SETUP > OBJECT MANAGER > Application. The left sidebar contains links for Details, Fields & Relationships, Page Layouts, and Lightning Record Pages. The main content area is titled 'Validation Rules' and shows '1 Items, Sorted by Rule Name'. A table lists the validation rules.

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
EndDate_After_StartDate	Top of Page	End Date must be later than Start Date.	✓	Nishant Kadu, 9/16/2025, 3:24 AM

2. Workflow Rules (Legacy)

- Workflow Rules are legacy tools (replaced by Flow) but noted here for reference.
 - Example: Auto-send an email when a *Mentorship Session* is created.

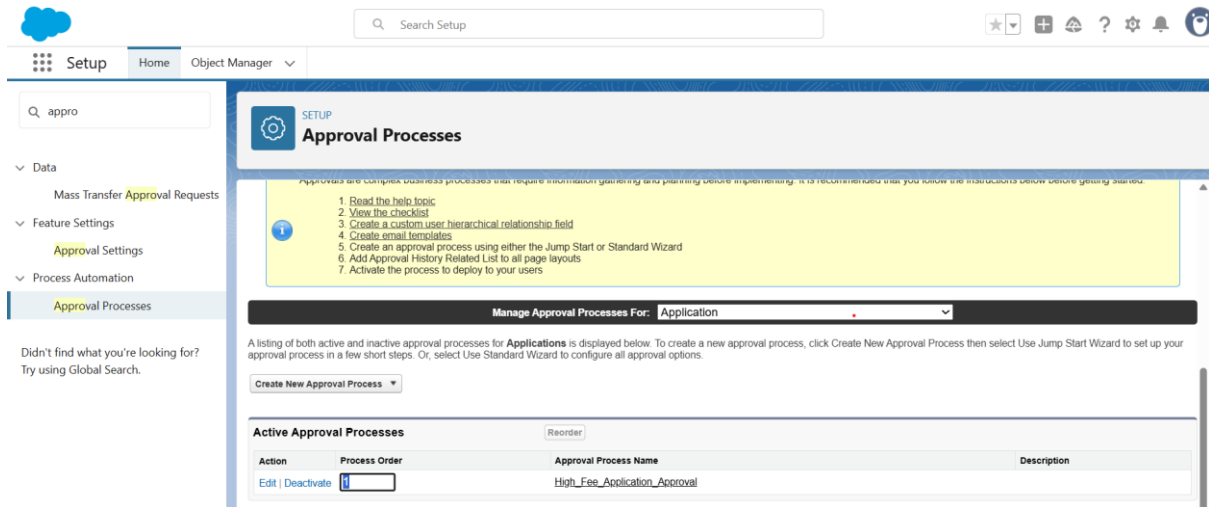
3. Process Builder (Legacy)

- Also legacy (replaced by Flow), but included for learning.
 - Example: Auto-update *Application Status* → “In Review” when submitted.

4. Approval Process

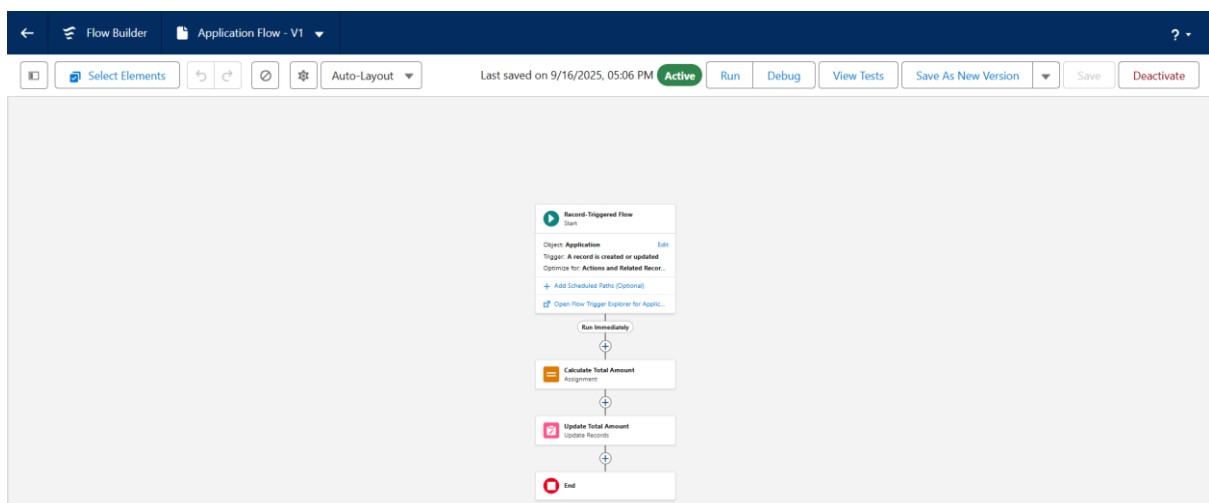
- Approval Processes route important records for manager review.
 - Example: If *Application Fee* > ₹50,000, send to Manager for approval.

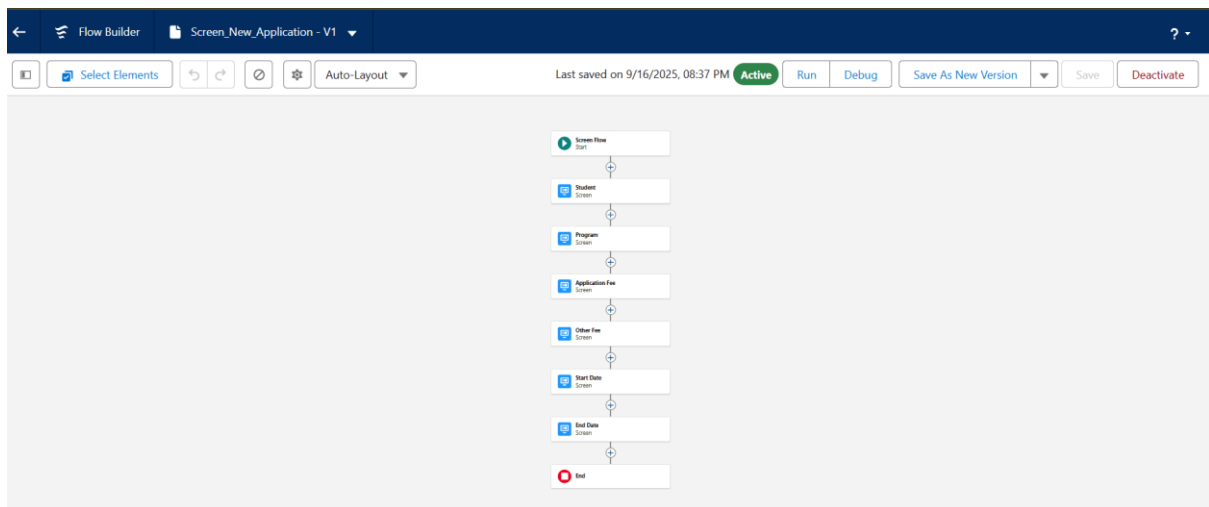
- Actions after approval:
 - Update *Application Status* = “Approved”
 - Send Email Alert to Student



5. Flow Builder

- Flow Builder is the primary automation tool in Salesforce.
 - Record-Triggered Flow:
 - When *Application__c* is created → Calculate *Total Amount* (e.g., Fee + Charges).
 - Screen Flow:
 - Guided *Application Form* for Agents to capture Student details.





6. Email Alerts

- Automated email notifications keep users informed.
 - Example: After approval, send email to Student:
“Your application has been approved. Next steps will follow soon.”

SETUP Email Alerts

All Email Alerts

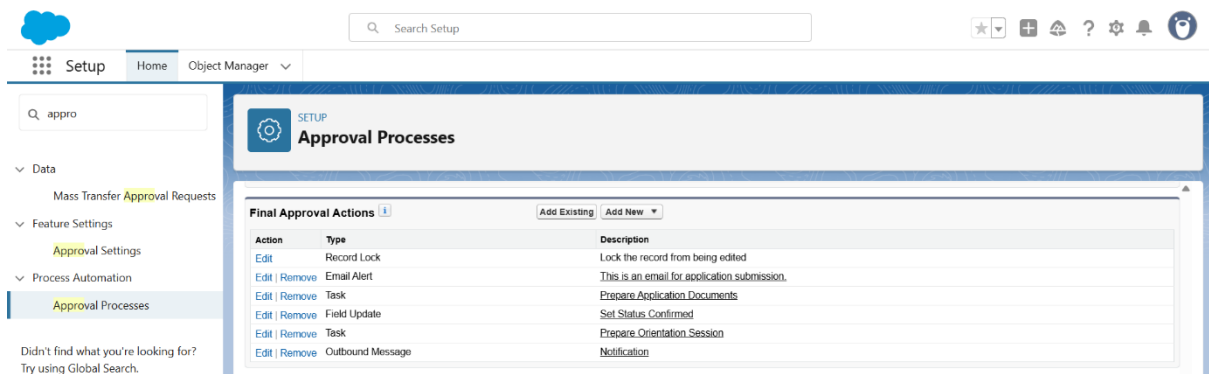
Email alerts are used to send emails from a flow or other automation.

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

Action	Description	Email Template Name	Object	Last Modified Date
Edit Del	This is an email for application rejection.	Rejection Email	Application	9/16/2025
Edit Del	This is an email for application rejection.	Rejection Email	Application	9/16/2025
Edit Del	This is an email for application submission.	Application_Aproved_Template	Application	9/16/2025
Edit Del	This is an email for application submission.	Application_Aproved_Template	Application	9/16/2025
Edit Del	This is an email for application submission.	Application_Aproved_Template	Application	9/16/2025

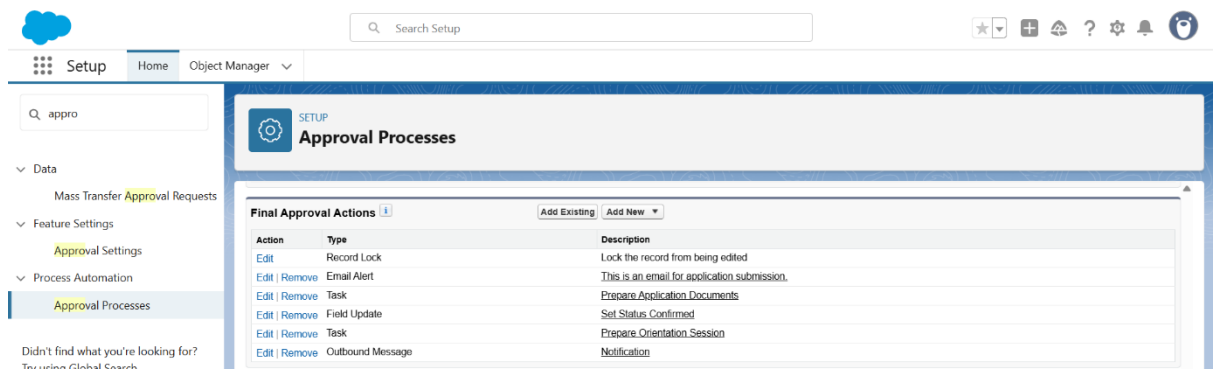
7. Field Updates

- Automatically update fields based on process outcomes.
 - Example: After approval, set *Application Status* = “Confirmed.”



8. Tasks

- Automated tasks ensure staff follow-up.
 - Example: After application approval, create a task for Mentor: *“Prepare Orientation Session.”*



9. Custom Notifications

- Real-time in-app alerts keep agents updated.
 - Example: After approval, notify Mentor: *“New student application assigned to you.”*