

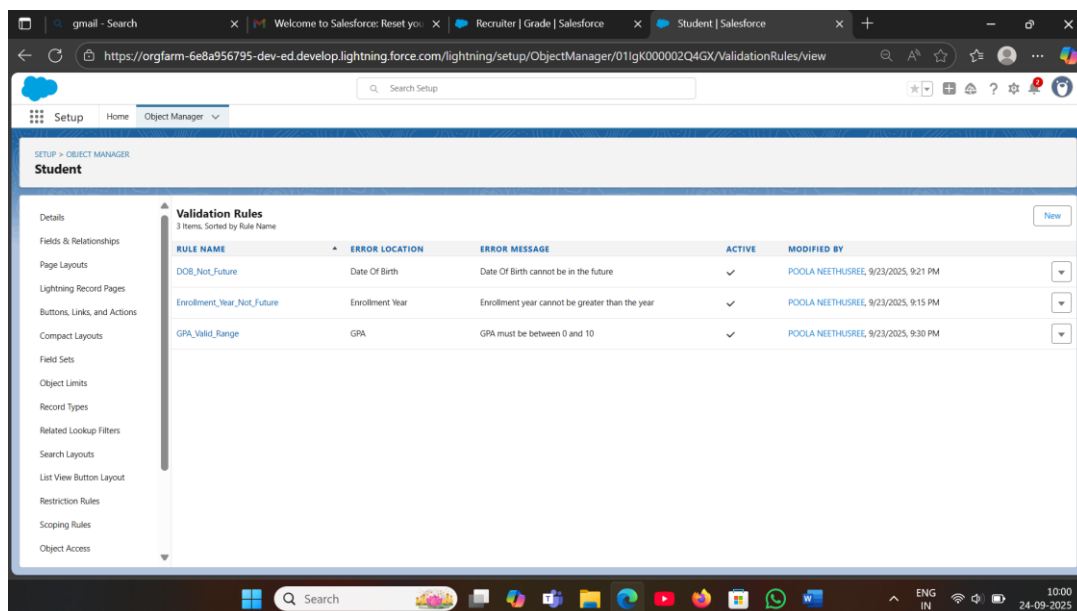
# Phase 4: Process Automation (Admin)

**Goal:** The goal of this phase is to automate repetitive administrative tasks in the **Student Management System**. Using Salesforce automation tools, we ensure student records are accurate, status updates are automatic, reminders are sent on time, and approval requests are streamlined without manual effort.

## 1. Validation Rules

**Object:** Student\_\_c

- **Rule:** Ensure Enrollment Year is not in the future.
- **Condition:** Enrollment\_Year\_\_c > YEAR(TODAY())
- **Error Message:** "Enrollment Year cannot be greater than the current year."



## 2. Workflow Rules

**Object:** Student\_\_c

- **Rule Name:** Inactive Student Update
- **Criteria:** Enrollment\_Year\_\_c < TEXT(YEAR(TODAY()))
- **Action:** Field Update → Status\_\_c = "Inactive"

Workflow Rules Setup Page: Send\_Welcome\_Email

Workflow Rule Detail:

- Rule Name: Send\_Welcome\_Email
- Active: ☒
- Object: Student
- Evaluation Criteria: Evaluate the rule when a record is created
- Description: TRUE
- Rule Criteria: TRUE
- Created By: POOLANEETHUSREE 9/23/2025, 9:43 PM
- Modified By: POOLANEETHUSREE 9/23/2025, 9:45 PM

Workflow Actions:

- Immediate Workflow Actions:
  - Type: Email Alert
  - Description: Welcome email to student!
- Time-Dependent Workflow Actions: You cannot add new time triggers to an active rule. [Deactivate This Rule](#)

Workflow Rules Setup Page: Low\_GPA\_Task

Workflow Rule Detail:

- Rule Name: Low\_GPA\_Task
- Active: ☒
- Object: Student
- Evaluation Criteria: Evaluate the rule when a record is created, and every time it's edited
- Description: GPA\_\_c < 5
- Rule Criteria: GPA\_\_c < 5
- Created By: POOLANEETHUSREE 9/23/2025, 10:16 PM
- Modified By: POOLANEETHUSREE 9/23/2025, 10:19 PM

Workflow Actions:

- Immediate Workflow Actions:
  - Type: Task
  - Description: Review Low GPA Student
- Time-Dependent Workflow Actions: You cannot add time-dependent workflow actions because your evaluation criteria is "Every time a record is created or edited". [Change Evaluation Criteria](#)

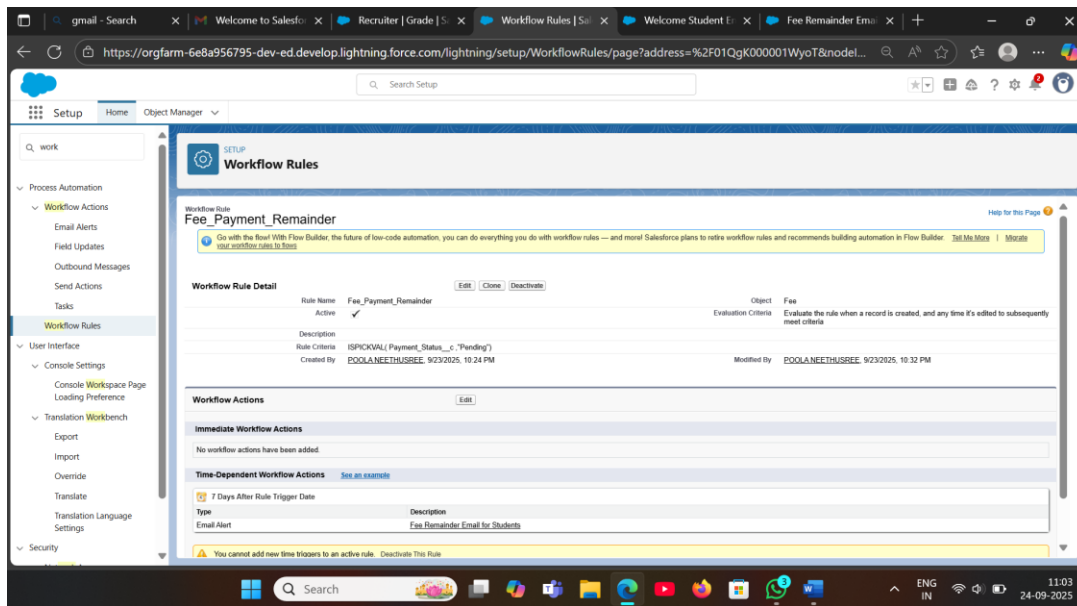
Workflow Rules Setup Page: Inactive Student Update

Workflow Rule Detail:

- Rule Name: Inactive Student Update
- Active: ☒
- Object: Student
- Evaluation Criteria: Evaluate the rule when a record is created, and every time it's edited
- Description: Enrollment\_Year\_\_c < Year(TODAY())
- Rule Criteria: Enrollment\_Year\_\_c < Year(TODAY())
- Created By: POOLANEETHUSREE 9/23/2025, 9:34 PM
- Modified By: POOLANEETHUSREE 9/23/2025, 9:35 PM

Workflow Actions:

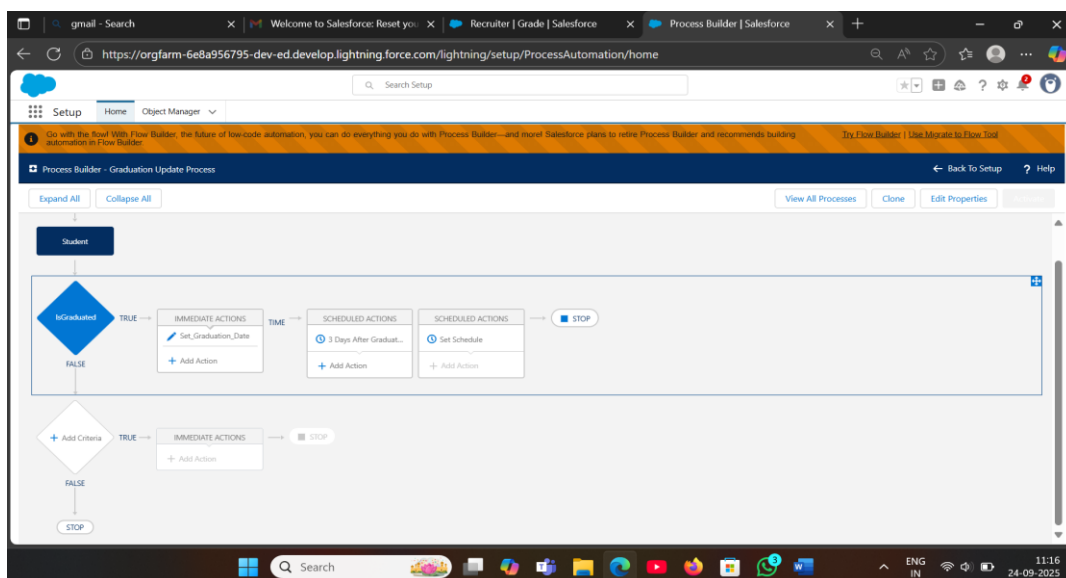
- Immediate Workflow Actions:
  - Type: Field Update
  - Description: Set Status Inactive
- Time-Dependent Workflow Actions: You cannot add time-dependent workflow actions because your evaluation criteria is "Every time a record is created or edited". [Change Evaluation Criteria](#)



### 3. Process Builder

**Object:** Student\_\_c

- **Process Name:** Graduation Update
- **Criteria:** When Status\_\_c = "Graduated"
- **Action 1:** Update Field → Graduation\_Date\_\_c = TODAY()
- **Action 2:** Send Email Alert → “Graduation Congratulations Email” to student.

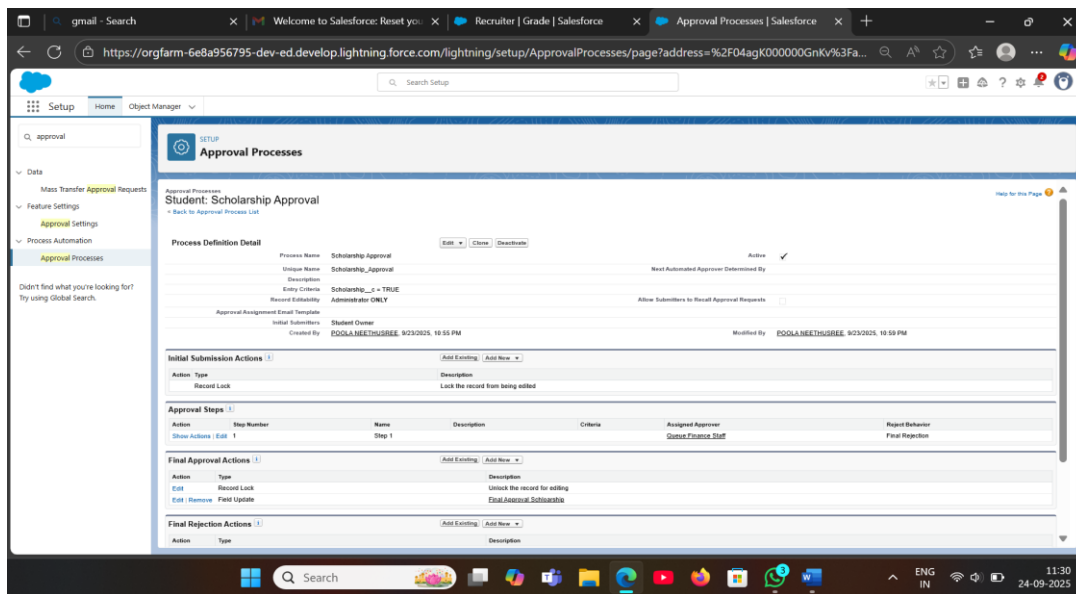


### 4. Approval Process

**Object:** Student\_\_c

- **Process Name:** Scholarship Approval

- **Entry Criteria:** Scholarship\_Requested\_\_c = TRUE
- **Steps:**
  1. Initial Submission → Lock record.
  2. Assigned To → Finance Staff Queue.
  3. Final Approval → Unlock record + Update Scholarship\_Status\_\_c = "Approved".
  4. Rejection → Update Scholarship\_Status\_\_c = "Rejected".



## 5. Flow Builder

### a) Screen Flow: Student Registration

- **Inputs:** First Name, Last Name, Email, Enrollment Year, Status.
- **Action:** Create Student record in Student\_\_c.

### b) Record-Triggered Flow: Auto Assign Status

- **When:** A new Student record is created.
- **Condition:** If Enrollment\_Year\_\_c = TEXT(YEAR(TODAY()))
- **Action:** Update Status\_\_c = "Enrolled".

### c) Scheduled Flow: Semester Reminder

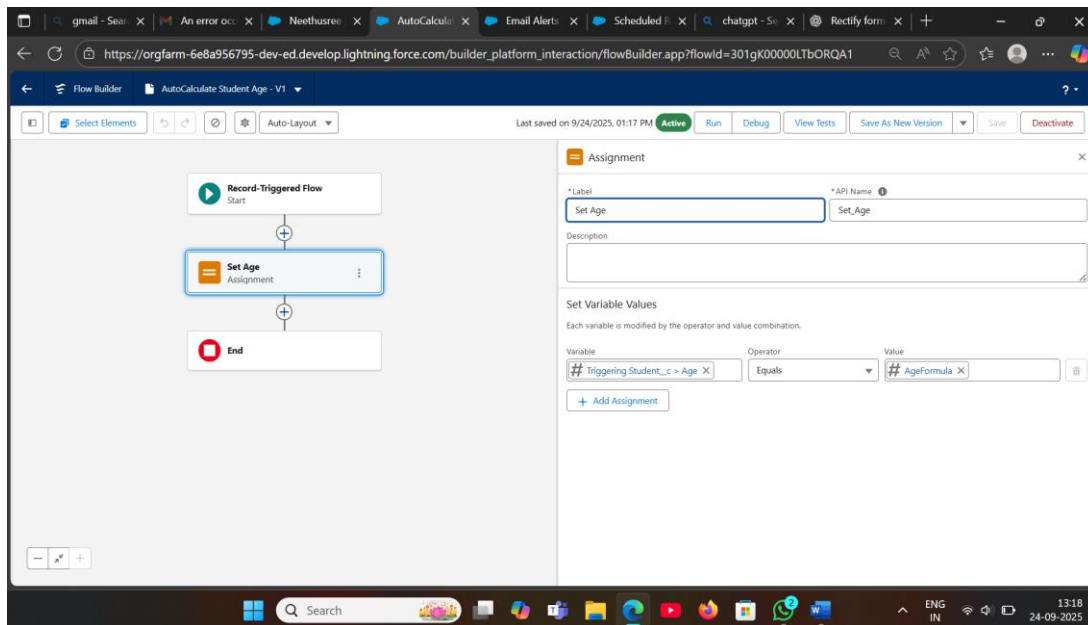
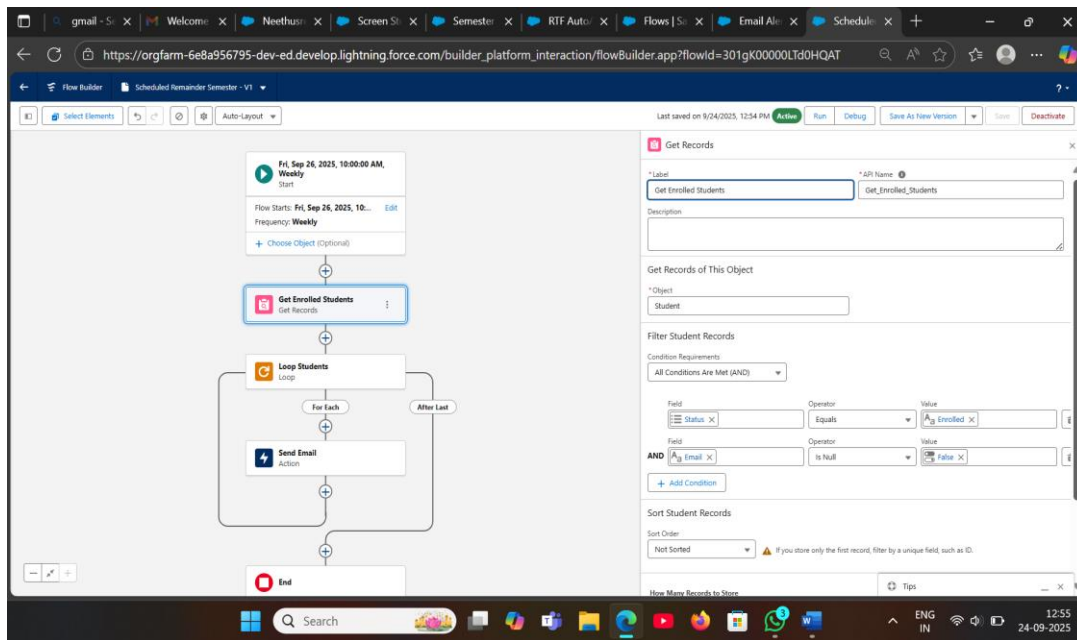
- **When:** Every semester start date (Scheduled path).
- **Action:** Send Email Alert to all Student\_\_c records with Status\_\_c = "Enrolled".

#### d) Auto-Launched Flow: Calculate Student Age

- **Formula:** TODAY() - Date\_of\_Birth\_\_c
- **Action:** Update Age\_\_c field in Student\_\_c.

The screenshot displays the Salesforce Flow Builder interface for a flow named 'Screen Student Registration - V1'. The flow diagram on the left shows a sequence: 'Screen Flow Start' → 'Student Screen Element' → 'Create Student Record' (highlighted) → 'End'. The 'Create Student Record' step is configured in the right-hand pane. It is set to 'Create a Record of This Object' for the 'Student' object. Under 'Set Field Values for the Student', five fields are mapped: 'First Name' from 'Student Screen Element > First Name', 'Last Name' from 'Student Screen Element > Last Name', 'Email' from 'Student Screen Element > Email > Required', 'Enrollment Year' from 'Student Screen Element > Enrollment Year', and 'Status' from 'Student Screen Element > Status'. The 'Manually assign variables (advanced)' checkbox is unchecked, and 'Check for Matching Records' is also unchecked. The top of the interface shows the URL 'https://orgfarm-6e8a956795-dev-ed.develop.lightning.force.com/builder\_platform\_interaction/flowBuilder.app?flowId=301gK00000LSJUNQA1' and the status 'Last saved on 9/24/2025, 11:51 AM'.

The screenshot displays the Salesforce Flow Builder interface for a flow named 'RTF AutoAssignStatus - V1'. The flow diagram on the left shows a sequence: 'Record-Triggered Flow Start' → 'Updating Records' (highlighted) → 'End'. The 'Updating Records' step is configured in the right-hand pane. It is set to 'Update Records' with a label 'Updating Records' and API Name 'Updating\_Records'. The 'Description' field is empty. Under 'How to Find Records to Update and Set Their Values', the first option 'Use the student record that triggered the flow' is selected. A note states: 'Because this flow runs before a record is saved, you can only update the record that triggered the flow to run. To update other records, configure the trigger to run the flow after the record is saved.' Under 'Set Filter Conditions', the 'Condition Requirements to Update Record' is set to 'None—Always Update Record'. Under 'Set Field Values for the Student Record', one field is mapped: 'Status' from 'Enrolled'. The top of the interface shows the URL 'https://orgfarm-6e8a956795-dev-ed.develop.lightning.force.com/builder\_platform\_interaction/flowBuilder.app?flowId=301gK00000LTAjQAH' and the status 'Last saved on 9/24/2025, 12:10 PM'.



## 6. Email Alerts

**Object:** Student\_\_c

- Templates Created:**

1. Welcome Student Email (after registration).
2. Semester Reminder Email.
3. Graduation Congratulations Email.

Setup Home Object Manager

email alert

Process Automation

Workflow Actions

Email Alerts

Didn't find what you're looking for? Try using Global Search.

### SETUP Email Alerts

Email Alert: Welcome email to student

Rules Using This Email Alert | Approval Processes Using This Email Alert | Entitlement Processes Using This Email Alert

<b>Email Alert Detail</b>		<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Clone</a>
Description	Welcome email to student	Email Template: Welcome Student Email
Unique Name	Welcome_email_to_student	Object: Student
From Email Address	Current User's email address	
Recipients	Email Field: Email	
Additional Emails		
Created By	POOLANEETHUSREE, 9/23/2025, 10:10 PM	Modified By: POOLANEETHUSREE, 9/23/2025, 10:10 PM
		<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Clone</a>

**Rules Using This Email Alert** [Rules Using This Email Alert Help](#)

This alert is currently not used by any rules

**Approval Processes Using This Email Alert** [Approval Processes Using This Email Alert Help](#)

This alert is currently not used by any approval processes

**Entitlement Processes Using This Email Alert**

This alert is currently not used by any entitlement processes

Setup Home Object Manager

email alert

Process Automation

Workflow Actions

Email Alerts

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### SETUP Email Alerts

Email Alert: Semester Remainder Alert

Rules Using This Email Alert | Approval Processes Using This Email Alert | Entitlement Processes Using This Email Alert

<b>Email Alert Detail</b>		<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Clone</a>
Description	Semester Remainder Alert	Email Template: Semester Remainder Email
Unique Name	Semester_Remainder_Alert	Object: Student
From Email Address	Current User's email address	
Recipients	Role: Principal Role: HOD Role: Teacher Email Field: Email	
Additional Emails		
Created By	POOLANEETHUSREE, 9/24/2025, 12:14 AM	Modified By: POOLANEETHUSREE, 9/24/2025, 12:14 AM
		<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Clone</a>

**Rules Using This Email Alert** [Rules Using This Email Alert Help](#)

This alert is currently not used by any rules

**Approval Processes Using This Email Alert** [Approval Processes Using This Email Alert Help](#)

This alert is currently not used by any approval processes

**Entitlement Processes Using This Email Alert**

This alert is currently not used by any entitlement processes

Setup Home Object Manager

email alert

Process Automation

Workflow Actions

Email Alerts

Didn't find what you're looking for? Try using Global Search.

### SETUP Email Alerts

Email Alert: Fee Remainder Email for Students

Rules Using This Email Alert | Approval Processes Using This Email Alert | Entitlement Processes Using This Email Alert

<b>Email Alert Detail</b>		<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Clone</a>
Description	Fee Remainder Email for Students	Email Template: Fee Remainder Email
Unique Name	Fee_Remainder_Email_for_Students	Object: Fee
From Email Address	Current User's email address	
Recipients	User: Finance Users User: HOD Users	
Additional Emails		
Created By	POOLANEETHUSREE, 9/23/2025, 10:32 PM	Modified By: POOLANEETHUSREE, 9/23/2025, 10:32 PM
		<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Clone</a>

**Rules Using This Email Alert** [Rules Using This Email Alert Help](#)

Action	Rule Name	Description	Object	Active
<a href="#">Edit</a> <a href="#">Deactivate</a>	Fee_Payment_Reminder		Fee	✓

**Approval Processes Using This Email Alert** [Approval Processes Using This Email Alert Help](#)

This alert is currently not used by any approval processes

**Entitlement Processes Using This Email Alert**

This alert is currently not used by any entitlement processes



## 7. Field Updates

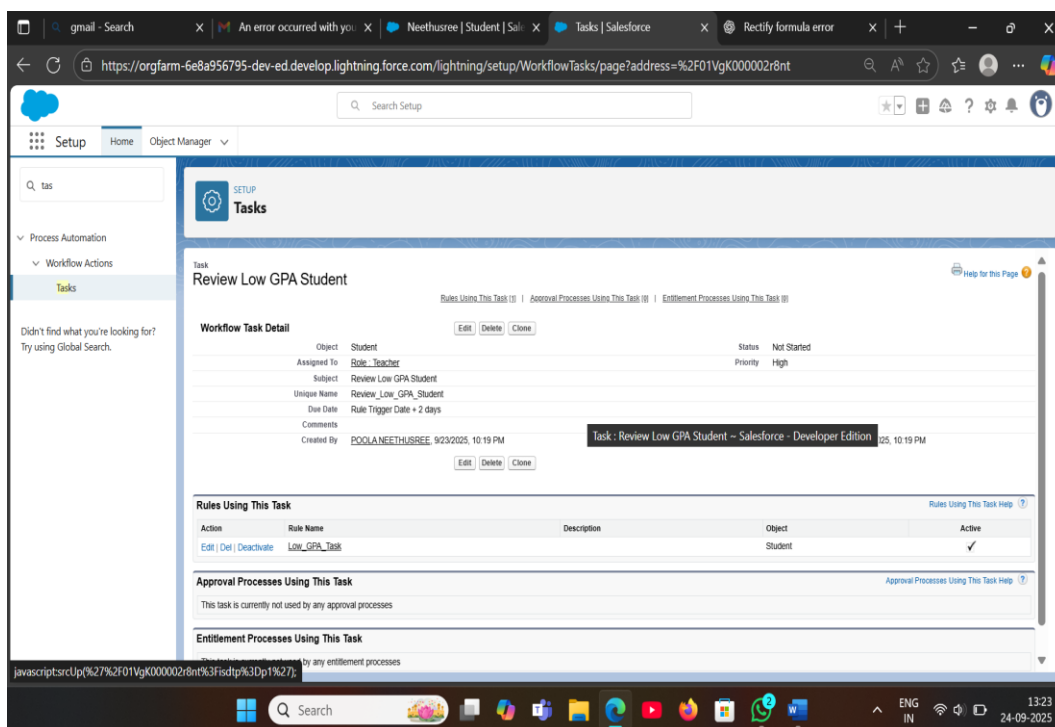
### Objects & Fields:

- Student\_\_c.Status\_\_c → "Inactive" (Workflow Rule).
- Student\_\_c.Graduation\_Date\_\_c → TODAY() (Process Builder).
- Student\_\_c.Age\_\_c → Formula result (Flow).

## 8. Tasks

### Object: Student\_\_c

- **Example:** Checks whether a student is having Low GPA than the standard eligibility GPA.



## 9. Custom Notifications

### Object: Student\_\_c

- **Example:** When a student is marked as “Graduated”, send a **Custom Notification** to the Advisor/Staff to initiate alumni registration.



gmail - Se...An error oc...Neethusree...Student | So...Custom No...Flows | Sale...Send Grad...Rectify form...+  
https://orgfarm-6e8a956795-dev-ed.develop.lightning.force.com/lightning/setup/CustomNotifications/home

SetupHomeObject Manager

custom no

Notification Builder

Custom Notifications

Didn't find what you're looking for?  
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Custom Notifications

When you create and use custom notifications, the title and body of the custom push notification may be saved to and processed by Google, Microsoft and/or Apple. Salesforce is not responsible for the privacy and security practices of third-party systems or applications like Google Cloud Messaging or Apple Push Notification Service.

Custom Notification Types

New

Send custom notifications using [Flows](#) or [Process Builder](#)

NOTIFICATION NAME	API NAME	NAMESPACE	DESKTOP	MOBILE
enablement_coaching_feedback_ready	enablement_coaching_feedback_ready		✓	▼
Graduation Notice	Graduation_Notice		✓	✓▼

Search

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