

INSTITUTE MANAGEMENT SYSTEM

Phase 4: Process Automation

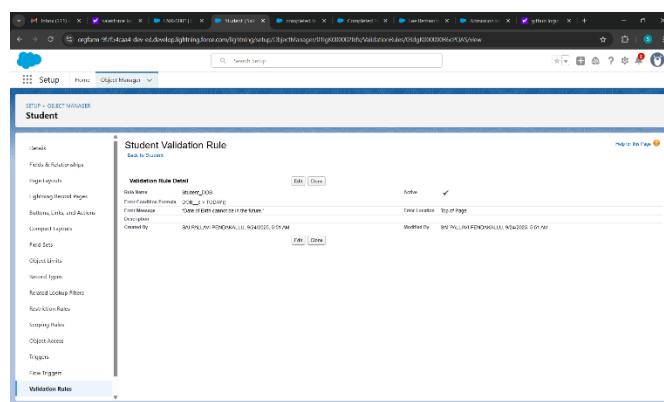
Goal: Automate repetitive or critical tasks for students, enrollments, courses, and fee payments.

Step 1: Create Validation Rules

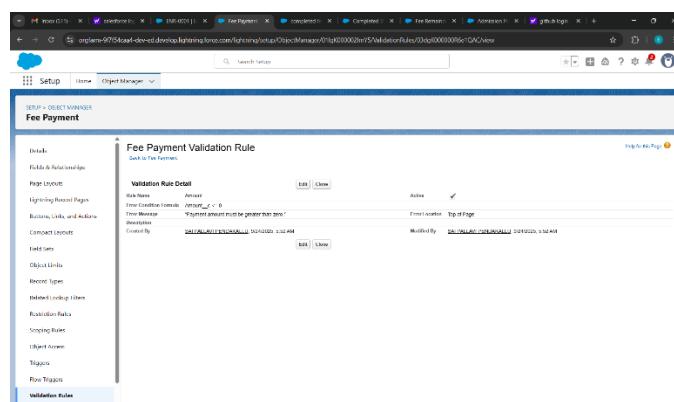
Validation rules ensure data integrity.

Examples for IMS:

- **Student DOB cannot be in the future:**
 - Formula: `DOB__c > TODAY()`
 - Error Message: “*Date of Birth cannot be in the future.*”



- **Fee Payment Amount > 0:**
 - Formula: `Amount__c <= 0`
 - Error: “*Payment amount must be greater than zero.*”

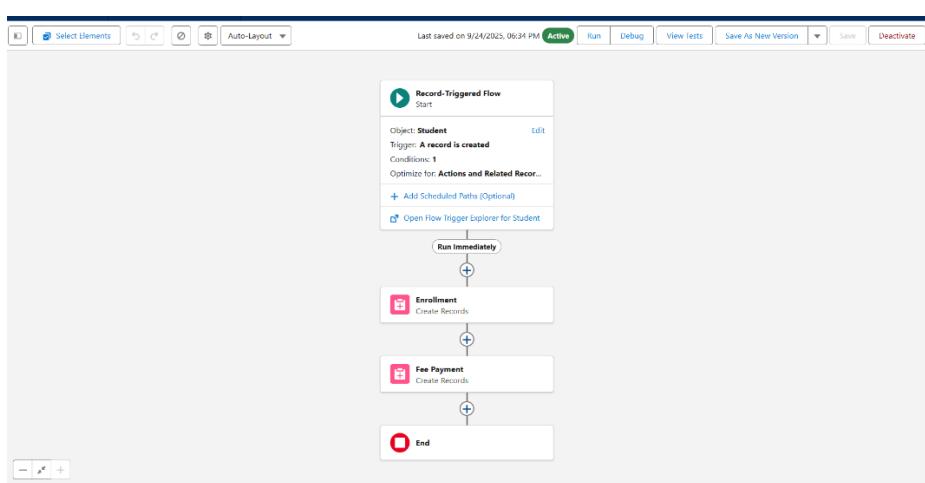


Step 2: Create Record-Triggered Flow

Goal: Automate Enrollment and Fee Payment creation when a Student is admitted.

1. Go to Setup → Flow → New Flow → Record-Triggered Flow.
2. **Select Object:** Student
3. **Trigger:** When a record is created or updated
4. **Entry Condition:** Enrollment_Status__c = 'Admitted'
5. **Actions inside the Flow:**
 - o **Create Enrollment Record:**
 - Link to Student (Student__c)
 - Assign Course__c = Primary_Course__c
 - Set Enrollment_Date__c = TODAY()
 - Set Status__c = Active
 - o **Create Fee Payment Record:**
 - Link to Student (Student__c)
 - Set Payment_Date__c = TODAY()
 - Set Amount__c = Course__c.Fees__c
 - Set Status__c = Pending
6. Save and activate the flow.

 Now when a student is admitted, Enrollment and Fee Payment are automatically created.



Outcome for the above flow is shown as below,

The screenshot shows a web-based application interface for 'Institute Management'. At the top, there's a navigation bar with links for Dashboards, Reports, Students, Faculties, Courses, Enrollments, and Fee Payments. Below the navigation is a header bar indicating a 'Student' record with ID 'STU-1001'. The main content area is divided into two sections: 'Related' and 'Details'. The 'Related' section contains two expandable sections: 'Enrollments (1)' which lists one item with enrollment number 'ENR-0001', and 'Fee Payments (2)' which lists two items with payment numbers 'PAY-1000' and 'PAY-1002'. Each section has a 'New' button in the top right corner and a 'View All' link at the bottom.

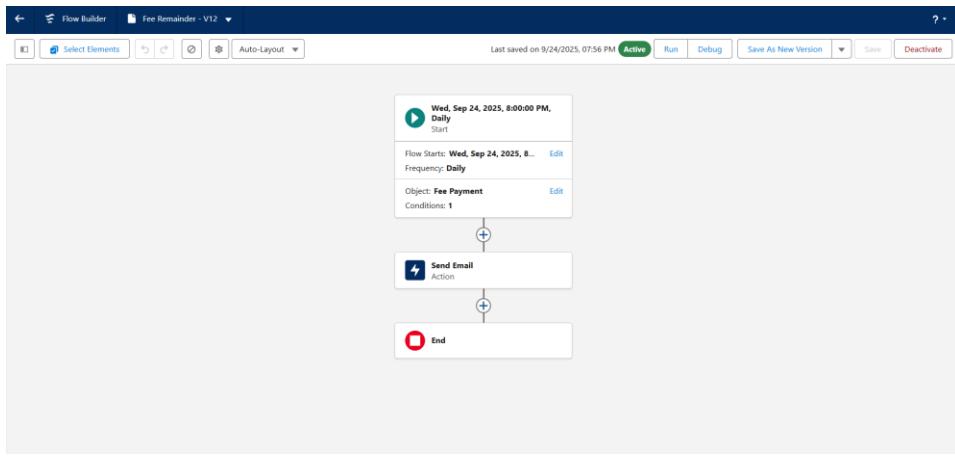
Step 3: Scheduled Flow – Daily Fee Reminders

Objective:

Ensure students are reminded each day about any outstanding fee payments.

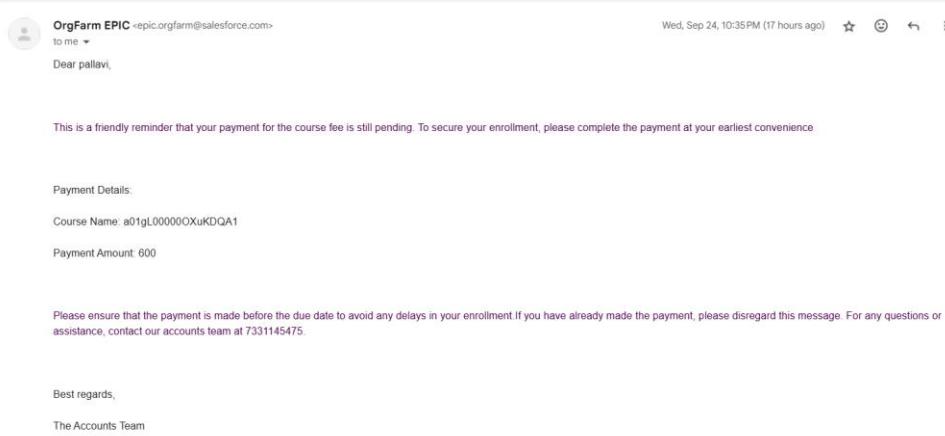
Setup Instructions:

- Go to **Setup** → **Flows** → **New Flow**.
- Choose **Scheduled-Triggered Flow** as the flow type.
- Define the schedule:
 - Run **every day**.
 - Set the start time to **4:30 PM**.
- Select the **Fee_Payment__c** object as the record source.
- Apply a filter where **Status__c = "Pending"**.
- Add an action element:
 - Type: **Send Email Alert**.
 - Recipient: **Student__c.Email**.
- Save the flow with the label **Fee Reminder Flow**.
- **Activate** the flow.



Result:

Students who still have fees marked as pending will automatically receive a daily reminder email, helping to promote timely payments.



Step 4: Record-Triggered Flow – Enrollment Status Update

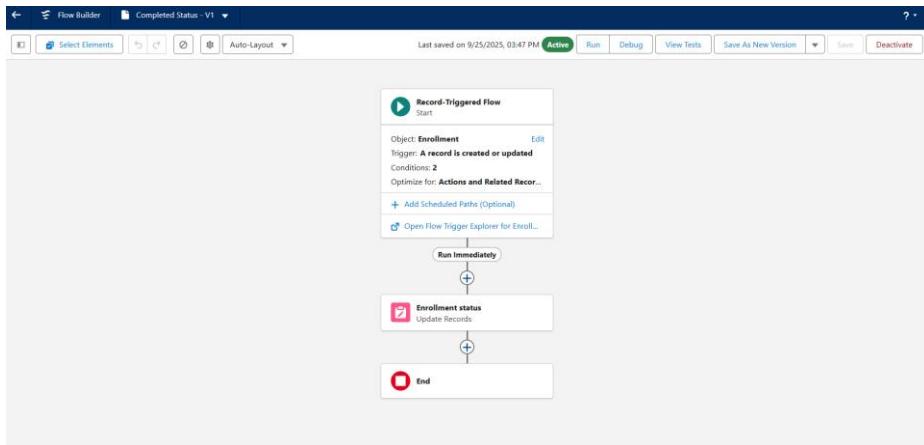
Objective:

Automatically change the enrollment status to “Completed” once a grade is provided for a student.

Setup Instructions:

- Go to **Setup** → **Flows** → **New Flow**.
- Select **Record-Triggered Flow**.
- Choose **Enrollment__c** as the object.
- Set the trigger to run **when a record is created or updated**.
- Define entry conditions:
 - Grade__c has been modified.

- Grade c is not blank.
- Optimize the flow for **Actions and Related Records**.
- Add an **Update Records** element:
 - Update the same **Enrollment_c** record.
 - Assign **Enrollment_Status_c** = "Completed".
- Save the flow with the label **Status Completed**.
- **Activate** the flow.



Result:

Whenever a grade is entered or updated for an enrollment, the system will automatically mark that enrollment as **Completed**, ensuring statuses stay accurate without manual updates.

Related		Details
Enrollment Number	ENR-0001	
Student	STU-1001	
Course	121	
Enrollment Date	9/25/2025	
Picklist	Completed	
Grade	A	
Enrollment Status	Completed	
Created By	SAI PALLAVI PENDAKALLU, 9/24/2025, 6:06 AM	
Owner	SAI PALLAVI PENDAKALLU	
Last Modified By	SAI PALLAVI PENDAKALLU, 9/25/2025, 3:18 AM	

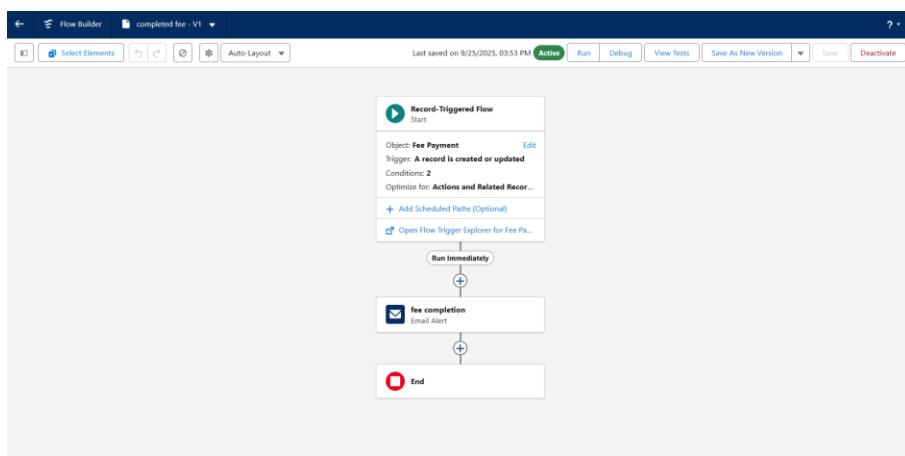
Step 5: Record-Triggered Flow – Fee Payment Status Update

Objective:

Ensure that whenever a payment is made, the fee status is automatically updated to “Paid” and the student is notified.

Setup Instructions:

- Navigate to **Setup** → **Flows** → **New Flow**.
- Select **Record-Triggered Flow**.
- Pick **Fee_Payment__c** as the object.
- Configure the trigger to run **when a record is created or updated**.
- Define conditions:
 - **Amount__c** is greater than 0.
 - **Status__c** is not equal to “Paid”.
- Add an **Update Records** element:
 - Update the same **Fee_Payment__c** record.
 - Set **Status__c = "Paid"**.
- Add an **Email Alert** action:
 - Send an email to the student confirming payment received.
- Save the flow with the label **Fee Status Updated**.
- **Activate** the flow.



Result:

Whenever a payment amount is entered, the fee record automatically changes to **Paid**, and the student receives an email confirmation. This keeps financial records accurate and ensures prompt communication.

Why is this message in spam? This message is similar to messages that were identified as spam in the past.

[Report not spam](#)

Hii pallavi,

You successfully Completed Your payment
Amount:0 is paid Today...

Thank you
Best Regards,
Accounts Team

Step 6: Record-Triggered Flow – Enrollment Email Notification

Objective:

Automatically send an email to students when their enrollment status is set to “**Active**”, ensuring they are informed promptly about their successful enrollment.

Setup Instructions:

- Navigate to **Setup → Flows → New Flow**.
- Select **Record-Triggered Flow**.
- Choose **Enrollment__c** as the object.
- Set the trigger to run **when a record is created or updated**.
- Define entry conditions:
 - **Status__c = "Active"**.
- Add an **Email Alert** element:
 - Send a notification to the student confirming their enrollment.
- Save the flow with the label **Enroll Students**.
- **Activate** the flow.

Result:

Whenever an enrollment record is created or updated with the status **Active**, the student automatically receives a confirmation email. This automation improves communication efficiency and eliminates the need for manual follow-ups.

Why is this message in spam? This message is similar to messages that were identified as spam in the past.

[Report not spam](#)

Hello pallavi,

Your enrollment in Electronics is confirmed.

Course Details:

Course Name: Electronics

Course Code: SC-0001

Instructor is already assigned to your course.

Please make sure to complete any pre-course requirements.

We look forward to seeing you in the course!

Best regards,

Accounts Team