

## Phase 4: Process Automation (Admin)

## Essential Validation Rules

Object: Student\_\_c

Purpose: Ensure academic status aligns with GPA performance

### Validation Rule 2: Graduation Date Logic

Object: Student\_\_c

### Validation Rule 2: Event Registration Capacity

Object: Event\_\_c

# Email Templates for Automation

## Template 1: Student Risk Alert

Folder: EduConnect Templates

Template Name: Student High Risk Alert

## Template 2: Alumni Engagement Welcome

Template Name: New Alumni Welcome

Quick Find / Search...

Expand All / Collapse All

Salesforce Mobile Quick Start

Home

Administrator

Release Updates

Manage Users

Manage Apps

Manage Territories

Company Profile

Data Classification

Privacy Center

Security Controls

Domain Management

Communication Templates

Classic Letterheads

Classic Email Templates

Mail Merge Templates

Translation Workbench

Data Management

Mobile Administration

Desktop Administration

Outlook Integration and Sync

Email Integration and Sync

Email Administration

Google Apps

Analytics

Tableau

Data.com Administration

Build

Unfiled Public Classic Email Templates

Create New Folder

A

B

C

D

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X

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Other

All

Below is a list of all your email templates in the folder selected. Click the new button to create a new text, HTML, Custom, or Visualforce email template. You can use these email templates when sending single emails. For mass emails, only text, HTML, and Custom templates may be used.

Folder: EduConnect Automation Templates

Create New Folder

New Template

Action

Email Template Name

Template Type

Available For Use

Description

Author

Last Modified Date

Edit | Del

Appointment for Unauthenticated User using Appointment Type - For Amazon China

Custom

✓

Email template for confirmation of an appointment when appointments are scheduled using appointment types with Amazon China

stfocadm

9/10/2025

Edit | Del

Appointment for Unauthenticated User using Appointment Type - For third party

Custom

✓

Email template for confirmation of an appointment when appointments are scheduled using appointment type with third party video applications

stfocadm

9/10/2025

Edit | Del

Appointment for Unauthenticated User using Engagement Channels - For Amazon China

Custom

✓

Email template for confirmation of an appointment when appointments are scheduled using engagement channels with Amazon China

stfocadm

9/10/2025

Edit | Del

Appointment for Unauthenticated User using Engagement Channels - For third party

Custom

✓

Email template for confirmation of an appointment when appointments are scheduled using engagement channels with third party video applications

stfocadm

9/10/2025

Edit | Del

Canceled Service Appointment Confirmation Email

Custom

✓

Email Template to confirm canceling of a service appointment

stfocadm

9/10/2025

Edit | Del

Commerce Recorder Portal: Invitation

Custom

✓

Invite a contact to a Commerce Recorder Portal

autocroc

9/10/2025

Edit | Del

Group Service Appointments Enrollment Confirmation Email

Custom

✓

Email Template to confirm enrollment of an attendee to a Group service appointment

stfocadm

9/10/2025

Edit | Del

Marketing: Product Inquiry Response

Text

✓

Standard email response to website product inquiries

OEPIC

9/10/2025

Edit | Del

Rescheduled Service Appointment Confirmation Email

Custom

✓

Email Template to confirm rescheduling of a service appointment

stfocadm

9/10/2025

Edit | Del

Sales: New Customer Email

Text

✓

Email to new customers

OEPIC

9/10/2025

Edit | Del

Scheduled Service Appointment Confirmation Email

Custom

✓

Email Template to confirm scheduling of a service appointment

stfocadm

9/10/2025

Edit | Del

Scheduler Payments: Payment Reminder for Service Appointment Email

Custom

✓

Email Template to remind customers to pay for their service appointment

stfocadm

9/10/2025

Edit | Del

Scheduler Payments: Service Appointment Cancellation Email

Custom

✓

Email Template to confirm the cancellation of a paid service appointment

stfocadm

9/10/2025

Edit | Del

Scheduler Payments: Service Appointment Confirmation Email

Custom

□

Email Template to confirm scheduling of a paid service appointment

stfocadm

9/10/2025

Edit | Del

Scheduler Payments: Service Appointment Confirmation Email for Guest Users

Custom

□

Email Template to confirm scheduling of a paid service appointment for guest users

stfocadm

9/10/2025

Edit | Del

Scheduler Payments: Service Appointment Rescheduled Email - Authenticated Users

Custom

✓

Email Template to confirm the rescheduling of a paid service appointment for authenticated users

stfocadm

9/10/2025

Edit | Del

Scheduler Payments: Service Appointment Rescheduled

Custom

✓

Email Template to confirm the rescheduling of a paid service appointment for

stfocadm

9/10/2025

Privacy Center	Security Controls		Domain Management		Communication Templates		Classic Letterheads		Classic Email Templates		Mail Merge Templates		Translation Workbench	Data Management	Mobile Administration	Desktop Administration	Outlook Integration and Sync	Email Integration and Sync	Email Administration	Google Apps	Analytics	Tableau	Data.com Administration																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																							
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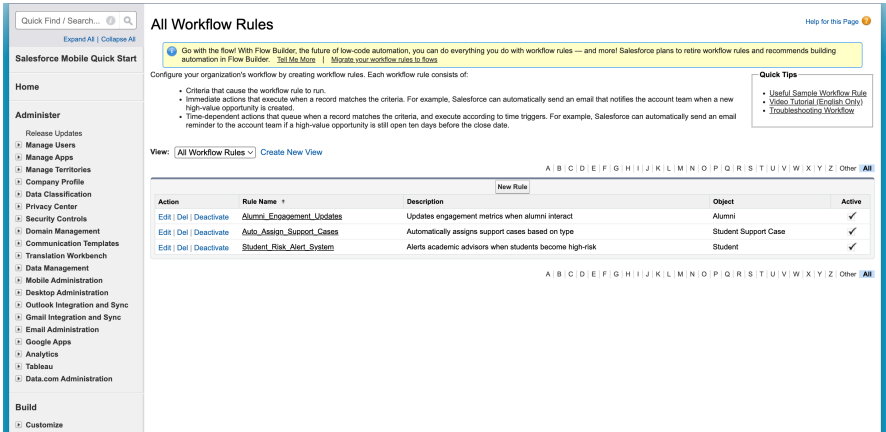
# Basic Workflow Rules

## Workflow Rule 1: Student Risk Score Alerts

Object: Student\_\_c

## Workflow Rule 2: Alumni Engagement Tracking

Object: Alumni\_\_c



# Risk Assessment Process Builder

## Process Builder: Student Risk Calculator

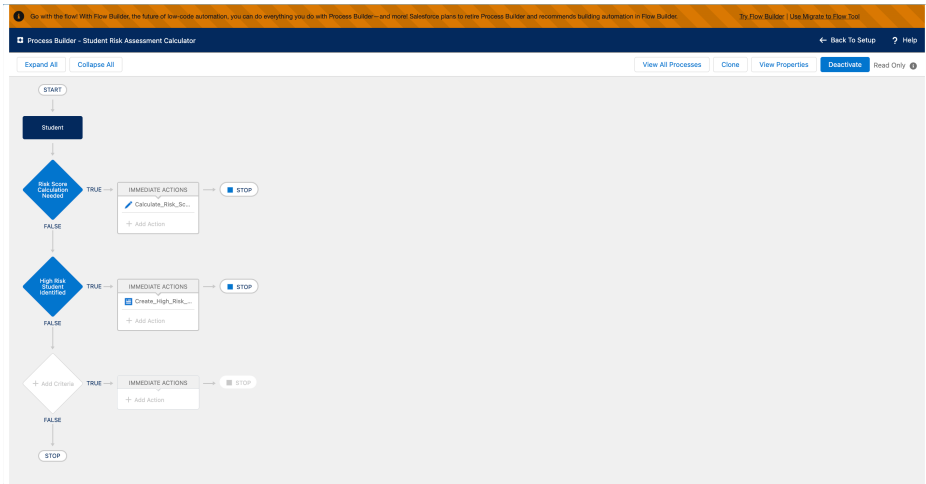
Process Name: Student\_Risk\_Assessment

Object: Student\_\_c

Trigger: Only when a record is created or edited

Criteria Node 1: Risk Score Calculation

Criteria Node 2: High Risk Intervention



## Course Performance Monitoring

Process Builder: Course Grade Impact

Process Name: Course\_Grade\_Monitoring

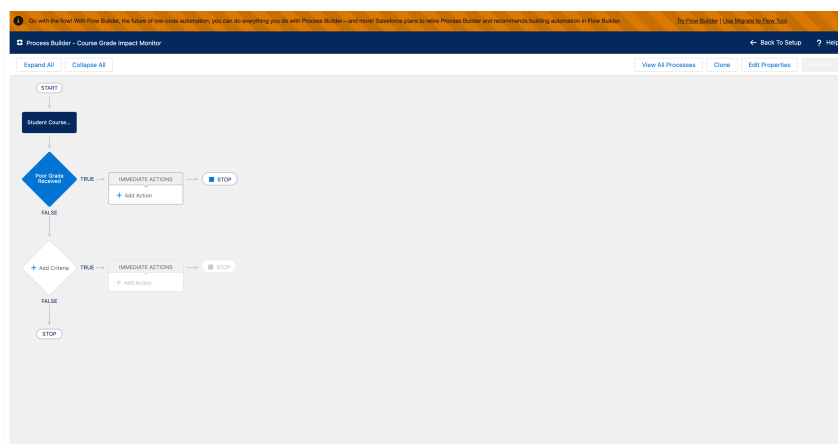
Object: Student\_Course\_Enrollment\_\_c

Criteria Node: Poor Grade Alert

## Support Case Auto-Assignment

Workflow Rule: Case Assignment by Type

Object: Student\_Support\_Case\_\_c



## Alumni & Event Automation

### Alumni Engagement Automation

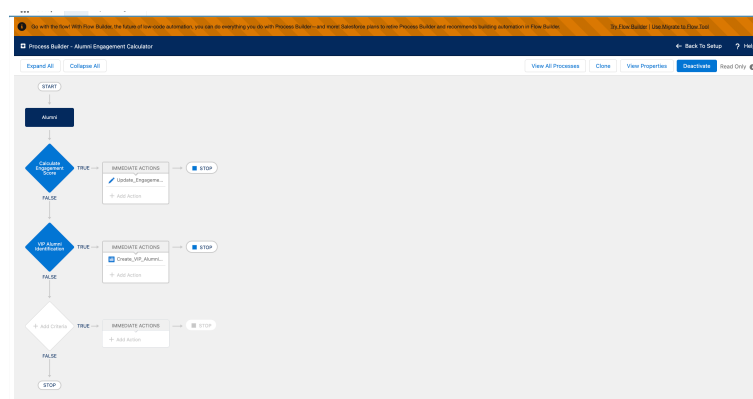
Process Builder: Alumni Activity Scoring

Process Name: Alumni\_Engagement\_Calculator

Object: Alumni\_\_c

Criteria Node: Engagement Score Update

Criteria Node: High Engagement Alumni



## Event Registration Management

Process Builder: Event Participation Processing

Process Name: Event\_Registration\_Handler  
Object: Event\_Participation\_\_c

Criteria Node: New Registration

Flow Builder: Event Capacity Management

Flow Name: Event\_Capacity\_Controller  
Trigger: Called from Process Builder above

## Mentorship Program Automation

Process Builder: Mentorship Opportunity Identification

Process Name: Mentorship\_Matching\_Prep  
Object: Student\_\_c

Criteria Node: Senior Student Identification

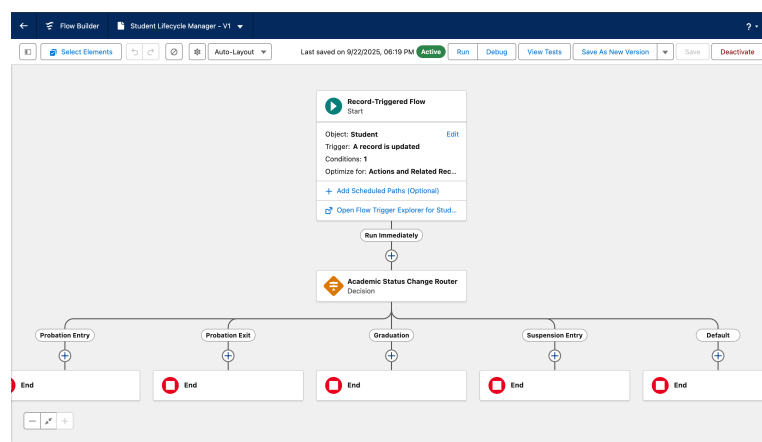
# Advanced Automation & Approval Processes

## Complex Student Journey Automation

Flow Builder: Student Status Change Handler

Flow Name: Student\_Lifecycle\_Manager  
Object: Student\_\_c  
Trigger: Record is updated

Decision Element: Status Change Router



# Approval Processes

## Approval Process 1: Program Change Requests

Object: Academic\_Program\_\_c

## Approval Process 2: Large Scholarship Awards

Object: Custom Object - Scholarship\_Award\_\_c  
(Create this object if needed for scholarship management)

# Email Automation Sequences

## Process Builder: Automated Email Campaigns

Process Name: Email\_Campaign\_Triggers

Alumni Email Sequence Trigger:

Approval Processes

Academic Program: Program Change Approval

[Back to Approval Process List](#)

Process Definition Detail

Process Name: Program Change Approval

Unique Name: Program\_Change\_Approval

Description: Approval required for significant program modifications

Entry Criteria: AND(OR(Credit\_Hours\_Required\_\_c > 0,ISPCDUALProgram\_Status\_\_c = "Active"),NOT(IsUser.ProfileId = "00agx000004CQr"))

Record Editability: Administrator ONLY

Approval Assignment Email Template: Account Owner

Initial Submitters: Pulte Pope Nicholas, 9/22/2025, 6:01 AM

Next Automated Approver Determined By:

Allow Submitters to Recall Approval Requests:

Modified By: Pulte Pope Nicholas, 9/22/2025, 6:11 AM

Initial Submission Actions

ActionTypeDescription

Record LockLock the record from being edited

Email AlertNotify Department Head of Program Change

TaskReview Submitted Program Change

Field UpdateSet Program Status Under Review

Approval Steps

ActionStep NumberNameDescriptionCriteriaAssigned ApproverReject Behavior

Show ActionsEdit1Department Head ReviewManually ChosenFinal Rejection

Final Approval Actions

ActionTypeDescription

Record LockLock the record from being edited

Final Rejection Actions

ActionTypeDescription

Record LockUnlock the record for editing

Recall Actions

ActionTypeDescription

Record LockUnlock the record for editing

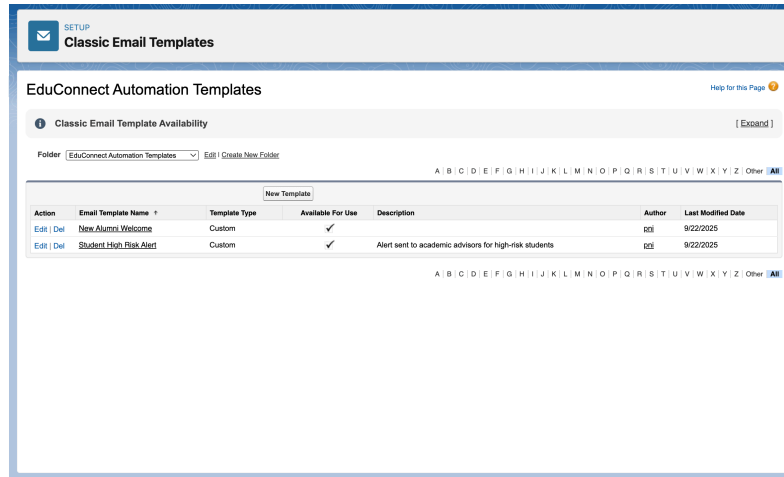
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Always show me more records per related list

# Essential Email Templates

Template 1: Event Registration Confirmation

Template 2: Student Academic Improvement



## Phase 4 Completion Checklist

Technical Implementation:

- 8+ validation rules prevent data quality issues
- 6+ email templates support automated communication
- 5+ workflow rules handle immediate response needs
- 4+ Process Builder flows manage complex business logic
- 2+ Flow Builder solutions handle advanced scenarios
- 2+ approval processes ensure proper governance
- Error handling prevents system failures
- Testing completed with realistic data volumes

Business Process Validation:

- Student risk assessment automation identifies at-risk students within 24 hours
- Academic advisor intervention workflow reduces response time to under 48 hours
- Alumni engagement automation increases profile completeness by 40%
- Event management handles registration, capacity, and communication automatically
- Support case routing eliminates manual assignment delays
- Email automation nurtures relationships without manual intervention
- Approval processes maintain compliance while improving efficiency

User Training & Documentation:

- Administrator training completed on monitoring and managing automation
- End-user training on new automated workflows and expectations
- Process documentation updated to reflect automated procedures
- Troubleshooting guide created for common automation issues
- Success metrics baseline established for measuring improvement









