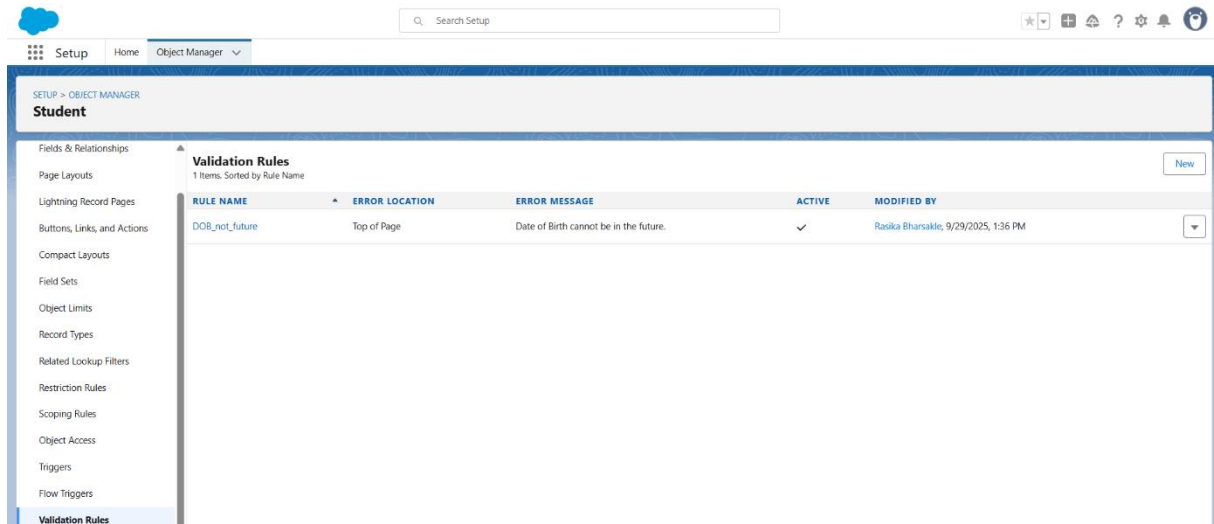


PHASE 4 – PROCESS AUTOMATION

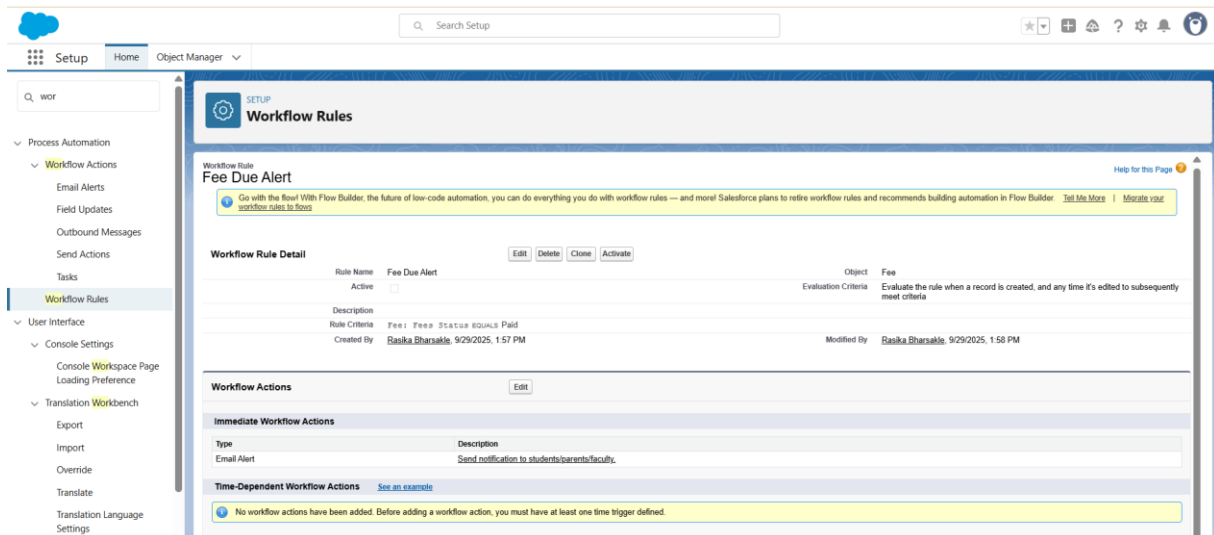
1. Validation Rules

Ensure the date of Birth cannot be in the future.



2. Workflow Rules

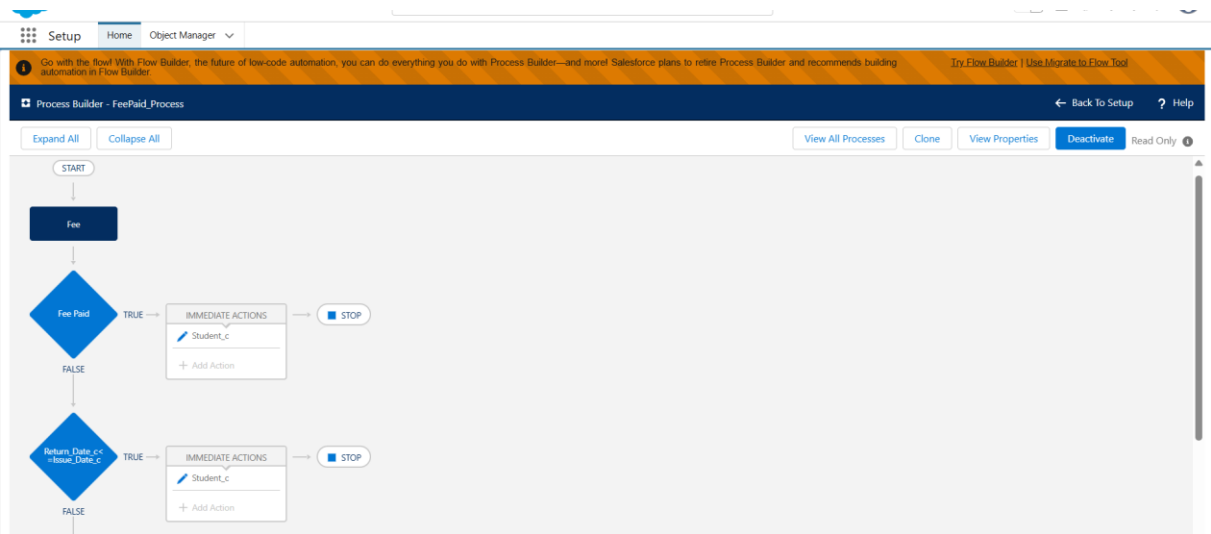
Select Object:Fee_c: when Fee_status becomes Paid=create task for finance team and send email alert.



3. Process Builder

Purpose: Visual automation that can do multiple actions (create/update records,call flows).Process Builder is being replaced by flow for advanced uses-but still useful for beginners.

- Create Process Name:FeePaid_Process.



4. Approval Process

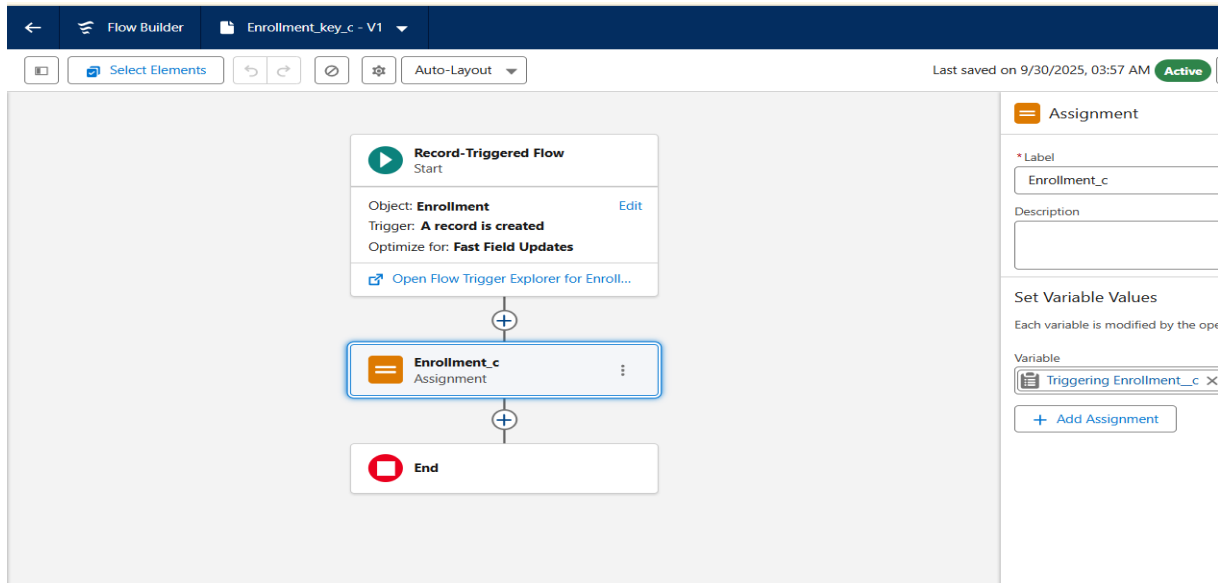
Purpose:Multi stepn approval (fee waiver,special admission,scholarship approval)

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
Show Actions Edit	1	Email Alert		Fee: Fee Status EQUALS Pending, else Approve	Manually Chosen	Final Rejection

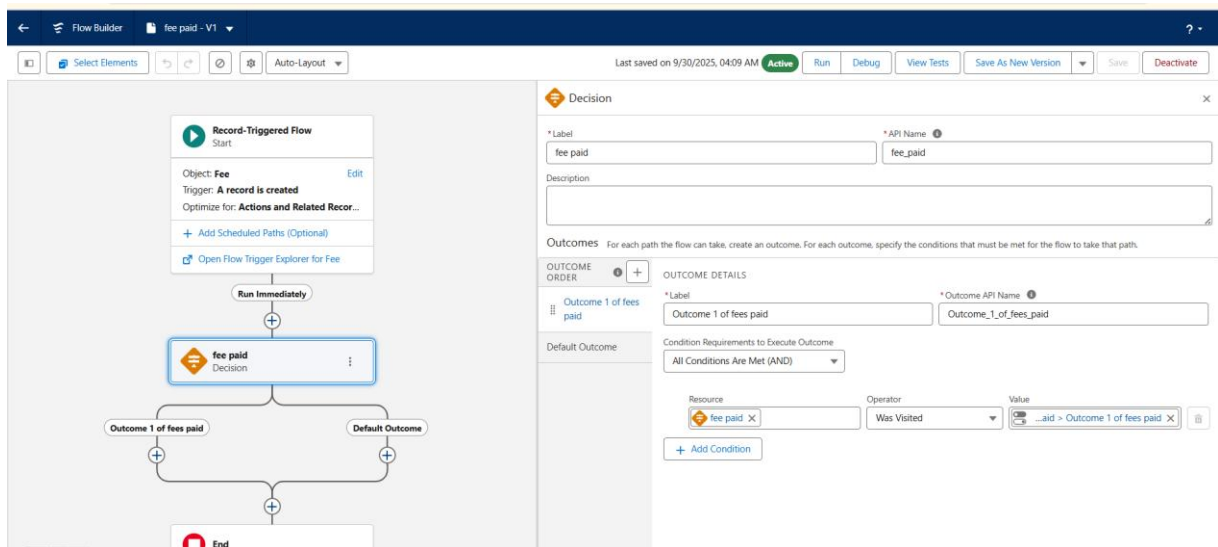
5. Flow Builder

Purpose:Prevent duplicate enrollment of same student +course.

A.Create unique Enrollment_Key:



B. When fee is paid update student total:



6. Email Alerts(Templates+Alerts+Actions)

Goal: Send formatted emails or eve requested, admission accepted

Email Alert: Fee Due Alert

- Object: Fee__c
- Recipient: Related User.

Setup | Home | Object Manager

Search Setup

Q 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 Due Alert

Rules Using This Email Alert (0) | Approval Processes Using This Email Alert (0) | Entitlement Processes Using This Email Alert (0)

Email Alert Detail

Description: Fee Due Alert

Unique Name: Fee_Due_Alert

From Email Address: Current User's email address

Recipients: Related User: Last Modified By

Additional Emails

Created By: Basika Bharsakla, 9/29/2025, 3:48 PM

Modified By: Basika Bharsakla, 9/29/2025, 3:48 PM

Email Template: Sales_New_Customer_Email

Object: Fee

Rules Using This Email Alert

This alert is currently not used by any rules

Approval Processes Using This Email Alert

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

Flows Using This Email Alert

Flow Name	Version	Description	Object	Active
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7. Field Update

Set field values automatically .

Field Update :Graduation _Date_c

Setup | Home | Object Manager

Search Setup

Q work

Process Automation

Workflow Actions

Email Alerts

Field Updates

Outbound Messages

Send Actions

Tasks

Workflow Rules

User Interface

Console Settings

Console Workspace Page Loading Preference

Translation Workbench

Export

Import

Override

Translate

Translation Language Settings

SETUP | Field Updates

Field Update: Graduation date

Rules Using This Field Update (0) | Approval Processes Using This Field Update (0) | Entitlement Processes Using This Field Update (0)

Field Update Detail

Name: Graduation date

Unique Name: Graduation_date

Description

Object: Student

Field to Update: Student: Program

Field Data Type: Picklist

Re-evaluate Workflow Rules after Field Change: ☐

New Field Value

Rules Using This Field Update

This field update is currently not used by any rules

Approval Processes Using This Field Update


This field update is currently not used by any approval processes







Entitlement Processes Using This Field Update

This field update is currently not used by any entitlement processes

8. Custom Notification

- Name:Fee_Reminder
- Channel:Desktop,Mobile.





SetupHomeObject Manager

Apps

Mobile Apps

Salesforce

Salesforce Notifications

Environments

Monitoring

API Usage Notifications

Notification Builder

Custom Notifications

Notification Delivery Settings

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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
Fee_Reminder	Fee_Reminder		✓	✓