

Phase 4: Process Automation (Admin Tools)

Overview:

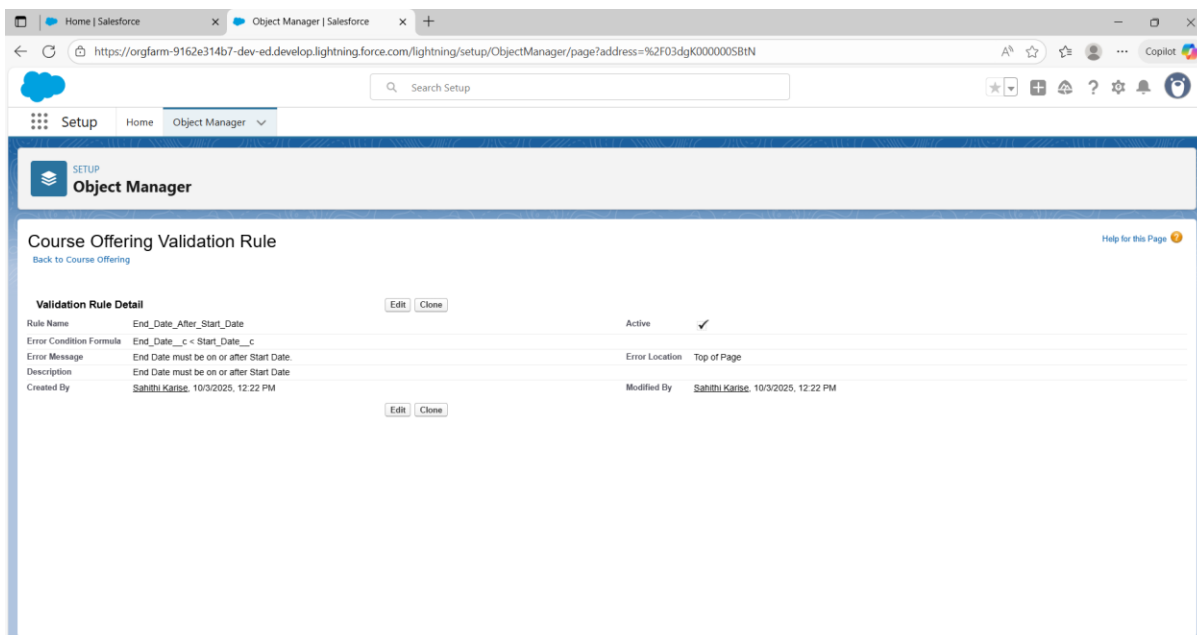
1. **Validation Rules** - Prevent invalid data entry
2. **Flow** - Check capacity & prerequisites before enrollment
3. **Flow** - Send enrollment confirmation emails
4. **Flow** - Send course reminders
5. **Approval Process** - For high-capacity courses (optional)
6. **Email Templates** - For automated emails

Section 1: Validation Rules

Validation Rule 1:

End Date After Start Date (Course Offering)

Purpose: Ensure End Date is always after Start Date



The screenshot displays the Salesforce Object Manager interface for a 'Course Offering Validation Rule'. The browser address bar shows the URL: <https://orgfarm-9162e314b7-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/page?address=%2F03dgK0000005BtN>. The page title is 'Course Offering Validation Rule' with a 'Back to Course Offering' link. The 'Validation Rule Detail' section shows the following information:

Validation Rule Detail		Edit		Clone	
Rule Name	End_Date_After_Start_Date	Active	✓		
Error Condition Formula	End_Date__c < Start_Date__c	Error Location	Top of Page		
Error Message	End Date must be on or after Start Date.	Created By	Sahithi Karise		
Description	End Date must be on or after Start Date	Modified By	Sahithi Karise		
Created By	Sahithi Karise	Modified By	Sahithi Karise		

Additional details include the creation date '10/3/2025, 12:22 PM' and a 'Help for this Page' link.

Validation Rule 2:

End Time After Start Time (Course Offering)

Home | Salesforce

Object Manager | Salesforce

https://orgfarm-9162e314b7-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/page?address=%2F03dgK0000005Buz

Search Setup

Setup

Home

Object Manager

SETUP

Object Manager

Course Offering Validation Rule

Back to Course Offering

Help for this Page

Validation Rule Detail

Edit

Clone

Rule Name	End_Time_After_Start_Time	Active	✓
Error Condition Formula	End_Time__c <= Start_Time__c	Error Location	Top of Page
Error Message	End Time must be after Start Time.		
Description	End Time must be after Start Time.		
Created By	Sahithi Karise, 10/3/2025, 12:25 PM	Modified By	Sahithi Karise, 10/3/2025, 12:25 PM

Edit

Clone

Validation Rule 3:

Capacity Must Be Positive

Home | Salesforce

Course Offering | Salesforce

https://orgfarm-9162e314b7-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000002JBh1/ValidationRules/view

Search Setup

Setup

Home

Object Manager

SETUP > OBJECT MANAGER

Course Offering

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Object Access

Triggers

Validation Rules

3 Items, Sorted by Rule Name

New

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY	
Capacity_Must_Be_Positive	Capacity	Capacity must be at least 1.	✓	Sahithi Karise, 10/3/2025, 12:27 PM	▼
End_Date_After_Start_Date	Top of Page	End Date must be on or after Start Date.	✓	Sahithi Karise, 10/3/2025, 12:22 PM	▼
End_Time_After_Start_Time	Top of Page	End Time must be after Start Time.	✓	Sahithi Karise, 10/3/2025, 12:25 PM	▼

Validation Rule 4:

Enrollment Date Not in Future (Enrollment)

Home | Salesforce

Object Manager | Salesforce

https://orgfarm-9162e314b7-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/page?address=%2F03dgK0000005ByD

Search Setup

Setup

Home

Object Manager

Object Manager

Enrollment Validation Rule

Back to Enrollment

Help for this Page

Validation Rule Detail

Rule Name

Enrollment_Date_Not_Future

Active

✓

Error Condition Formula

Enrollment_Date__c > TODAY()

Error Location

Enrollment Date

Error Message

Enrollment_Date__c > TODAY()

Modified By

Sahithi Karise 10/3/2025, 12:29 PM

Description

Enrollment date cannot be in the future

Created By

Sahithi Karise 10/3/2025, 12:29 PM

Edit

Clone

Section 2: Create Email Templates

Email Template 1:

Enrollment Confirmation

Home | Salesforce

Classic Email Templates | Salesforce

https://orgfarm-9162e314b7-dev-ed.develop.lightning.force.com/lightning/setup/CommunicationTemplatesEmail/page?address=%2F00XgK000007fwLn%3Fsetupid%3DCommunicatio...

Search Setup

Setup

Home

Object Manager

email templates

Email

Classic Email Templates

Lightning Email Templates

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

Classic Email Templates

Text Email Template

Enrollment Confirmation

Help for this Page

Preview your email template below.

Email Template Detail

Email Templates from Salesforce

Unified Public Classic Email Templates

Available For Use

✓

Email Template Name

Enrollment Confirmation

Last Used Date

Template Unique Name

Enrollment_Confirmation

Times Used

Encoding

Unicode (UTF-8)

Author

Sahithi Karise (Change)

Description

Sent when participant enrolls in a course

Created By

Sahithi Karise 10/3/2025, 12:33 PM

Modified By

Sahithi Karise 10/3/2025, 12:33 PM

Edit

Delete

Clone

Email Template

Send Text and Verify Merge Fields

Subject

Enrollment Confirmation - (Enrollment__c Course_Offering__r Course__r Name)

Plain Text Preview

Dear (Enrollment__c Participant__r FirstName),
Thank you for enrolling in the following course:
Course: (Enrollment__c Course_Offering__r Course__r Name)
Date: (Enrollment__c Course_Offering__r Start_Date__c) to (Enrollment__c Course_Offering__r End_Date__c)
Time: (Enrollment__c Course_Offering__r Start_Time__c) - (Enrollment__c Course_Offering__r End_Time__c)
Location: (Enrollment__c Course_Offering__r Location__c)
Instructor: (Enrollment__c Course_Offering__r Instructor__r Name)

Email Template 2:

Course Reminder

Setup

Home

Object Manager

email templates

Email

Classic Email Templates

Lightning Email Templates

Didn't find what you're looking for?

Try using Global Search.

Classic Email Templates

Course Reminder

Preview your email template below.

Email Template Detail

Email Templates from Salesforce

Email Template Name

Template Unique Name

Encoding

Author

Description

Created By

Untitled Public Classic Email Templates

Course Reminder

Course_Reminder

Unicode (UTF-8)

Sabithi Karise (Change)

Reminder sent 1 day before course

Sabithi Karise, 10/3/2025, 12:35 PM

Available For Use

Last Used Date

Times Used

Modified By

✓

Sabithi Karise, 10/3/2025, 12:35 PM

Email Template

Send Test and Verify Merge Fields

Subject

Reminder: Your course starts tomorrow - (Enrollment__c.Course_Offering__r.Course__r.Name)

Plain Text Preview

Dear (Enrollment__c.Participant__r.FirstName),
This is a reminder that your course starts tomorrow:
Course: (Enrollment__c.Course_Offering__r.Course__r.Name)
Date: (Enrollment__c.Course_Offering__r.Start_Date__c)
Time: (Enrollment__c.Course_Offering__r.Start_Time__c)
Location: (Enrollment__c.Course_Offering__r.Location__c)
Please arrive 10 minutes early.
See you soon!

Email Template 3:

Enrollment Blocked Notification

Setup

Home

Object Manager

email templates

Email

Classic Email Templates

Lightning Email Templates

Didn't find what you're looking for?

Try using Global Search.

Classic Email Templates

Enrollment Blocked

Preview your email template below.

Email Template Detail

Email Templates from Salesforce

Email Template Name

Template Unique Name

Encoding

Author

Description

Created By

Enrollment Blocked

Enrollment_Blocked

Enrollment_Blocked

Unicode (UTF-8)

Sabithi Karise (Change)

Sabithi Karise, 10/3/2025, 12:36 PM

Available For Use

Last Used Date

Times Used

Modified By

✓

Sabithi Karise, 10/3/2025, 12:36 PM

Email Template

Send Test and Verify Merge Fields

Subject

Unable to enroll - Course Full

Plain Text Preview

Dear User,
Unfortunately, the course you tried to enroll in is currently full.
Course: (Course_Offering__c.Course__r.Name)
Date: (Course_Offering__c.Start_Date__c)
Capacity: (Course_Offering__c.Capacity__c)
Currently Enrolled: (Course_Offering__c.Enrolled_Count__c)
Please try another offering or contact the training department.

Section 3: Flow

Capacity Check Before Enrollment

1. Start element configured and Get Course Offering element configured

The screenshot shows the Salesforce Flow Builder interface. On the left, a flow diagram is visible with the following steps: **Record-Triggered Flow** (Start), **Run Immediately**, **Get Course Offering** (Get Records), and **End**. The **Get Course Offering** element is highlighted. On the right, the configuration panel for the **Get Records** element is shown. It includes the following settings:

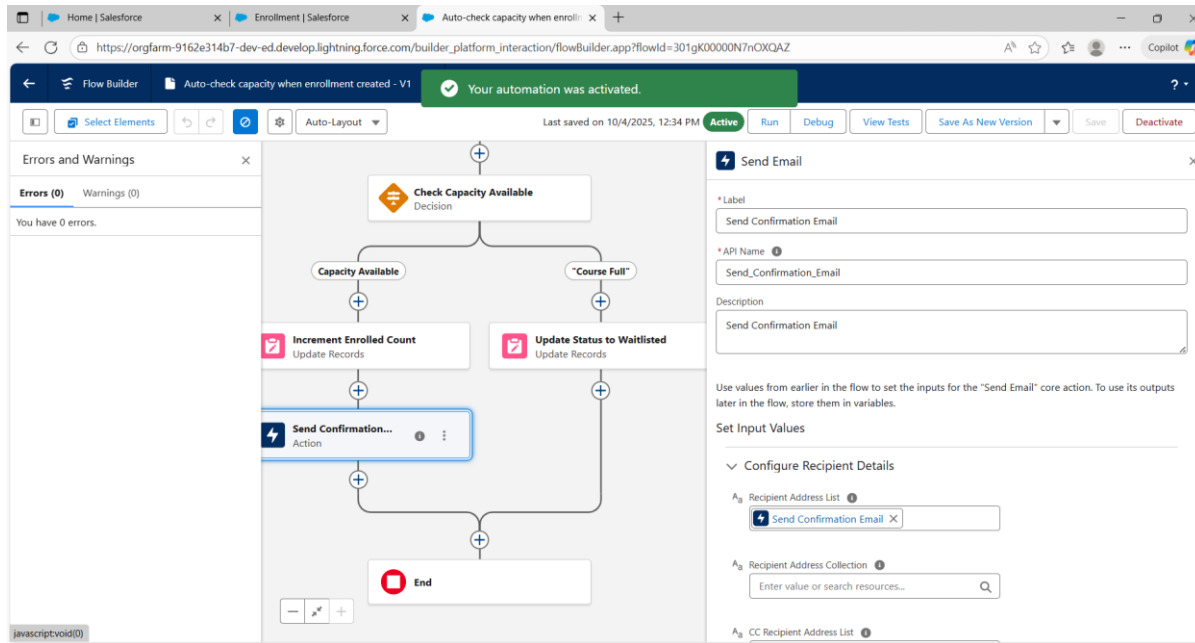
- Filter Course Offering Records**: Condition Requirements set to "All Conditions Are Met (AND)". A single condition is added: Field **Created By**, Operator **Equals**, Value **__rollment_c > Course Offering**.
- Sort Course Offering Records**: Sort Order set to **Not Sorted**. A warning icon indicates: "If you store only the first record, filter by a unique field, such as ID."
- How Many Records to Store**: **Only the first record** is selected.
- How to Store Record Data**: **Automatically store all fields** is selected.

2. Decision element configured

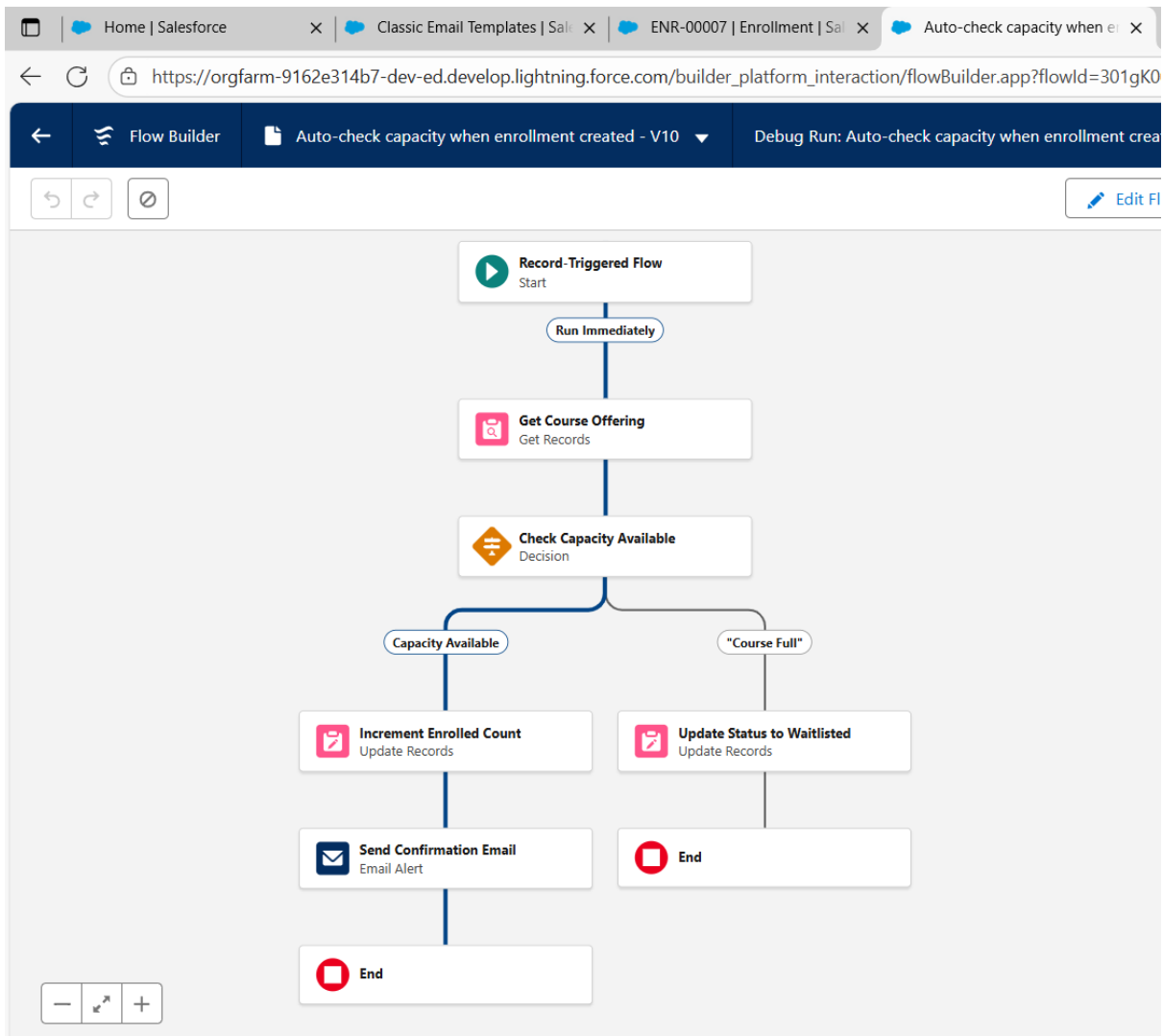
The screenshot shows the Salesforce Flow Builder interface. On the left, a flow diagram is visible with the following steps: **Open Flow Trigger Explorer for Enroll...**, **Run Immediately**, **Get Course Offering** (Get Records), **Check Capacity Available** (Decision), and **End**. The **Check Capacity Available** element is highlighted. On the right, the configuration panel for the **Decision** element is shown. It includes the following settings:

- * Label**: **Check Capacity Available**. *** API Name**: **Check_Capacity_Available**.
- Description**: (Empty text area).
- Outcomes**: For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.
- OUTCOME ORDER**: **Capacity Available** is the first outcome.
- OUTCOME DETAILS**: *** Label**: **Capacity Available**. *** Outcome API Name**: **Capacity_Available**.
- Condition Requirements to Execute Outcome**: **All Conditions Are Met (AND)**.
- Resource**: **## ...se Offering > Enrolled Count**. **Operator**: **Less Than**. **Value**: **## ...et Course Offering > Capacity**.

3. Update Enrolled Count element , Email Alert created and Update Status element on Course Full path



4. Flow activated successfully



5. Test the Flow

The screenshot displays the Salesforce Lightning Experience interface. The top navigation bar includes the Salesforce logo, a search bar, and a navigation menu with options like Home, Reports, Dashboards, Courses, Course Offerings, Enrollments (selected), and Test Participant | Contact. A green toast message at the top states "Enrollment 'ENR-00011' was created." Below this, the record details for Enrollment ENR-00011 are shown. The "Details" tab is active, displaying fields for Participant (Nithya Reddy), Course Offering (CO-0001), Enrollment Date (10/4/2025), Status (Registered), Attendance Marked, Completion Date, Certificate Sent, Feedback, Enrollment Number (ENR-00011), Owner (Sahithi Karise), and Created/Last Modified By (Sahithi Karise, 10/4/2025, 6:27 AM). An "Activity" panel on the right shows a video titled "Personalize your navigation" with the subtitle "Lightning Experience Basics".

The screenshot shows a Gmail inbox with the search filter "in:spam" applied. The email titled "Enrollment Confirmation - Spam" is selected. The sender is Sahithi Karise via oTps79uf9da2_gk-7tzo9uam.can96.bnc.salesforce.com. The email content reads: "Thank you for enrolling in the course. Your enrollment was confirmed. We look forward to seeing you! Best regards, Training Department". The email is marked as "Spam" and has a "Report not spam" button. The left sidebar shows the Gmail navigation menu with "Spam" highlighted.

Section 4:

Scheduled Flow - Send Course Reminders

1: Create Scheduled Flow

2: Add Send Email Action

The screenshot displays the Salesforce Flow Builder interface for a scheduled flow named "Send Course Reminders - V1". The flow is active, as indicated by the green status bar at the top. The flow diagram shows a sequence of steps: a "Start" event (Sat, Oct 4, 2025, 8:00:00 AM, Daily), followed by a "Daily Course Reminders" email alert action, and finally an "End" step. The "Daily Course Reminders" action is highlighted with a blue border. The right-hand pane shows the configuration for the "Send Course Reminders" action, including fields for Label, API Name, and Description. The "Set Input Values" section shows a variable "Triggering Enrollment__c" being mapped to the "Record ID" input. The left-hand pane shows the "Errors and Warnings" section, which is currently empty.

Flow Builder: Send Course Reminders - V1

Your automation was activated.

Last saved on 10/4/2025, 07:44 PM

Active Run Debug Save As New Version Save Deactivate

Errors and Warnings

Errors (0) Warnings (0)

You have 0 errors.

Flow Start: Sat, Oct 4, 2025, 8:00:00 AM, Daily

Frequency: Daily

Object: Enrollment

Conditions: 1

Daily Course Reminders Email Alert

End

Send Course Reminders

* Label: Daily Course Reminders

* API Name: Daily_Course_Reminders

Description: Send Course Reminder

Use values from earlier in the flow to set the inputs for the "Send Course Reminder" email alert. To use its outputs later in the flow, store them in variables.

Set Input Values

A₃ * Record ID

A₃ Triggering Enrollment__c > Record ID

Show advanced options

Section 5:

Test All Automation

Test 1: Validation Rules

Test End Date Before Start Date:

The screenshot shows the Salesforce Training Management console. The 'New Course Offering' form is open, displaying the following details:

- Course Information:**
 - Course: DSA
 - Instructor: John Instructor
 - Location: Conference Room B
- Schedule:**
 - Start Date: 10/25/2025
 - End Date: 10/15/2025
 - Start Time: 8:00 AM
 - End Time: (empty)

Buttons at the bottom of the form include 'Cancel', 'Save & New', and 'Save'.

The screenshot shows the same 'New Course Offering' form, but with an error message displayed. The error message is a red box with a white 'X' icon, stating: "We hit a snag. Review the errors on this page. End Date must be on or after Start Date. End Time must be after Start Time." The error message is positioned over the 'End Date' field, which still contains the value 10/15/2025.