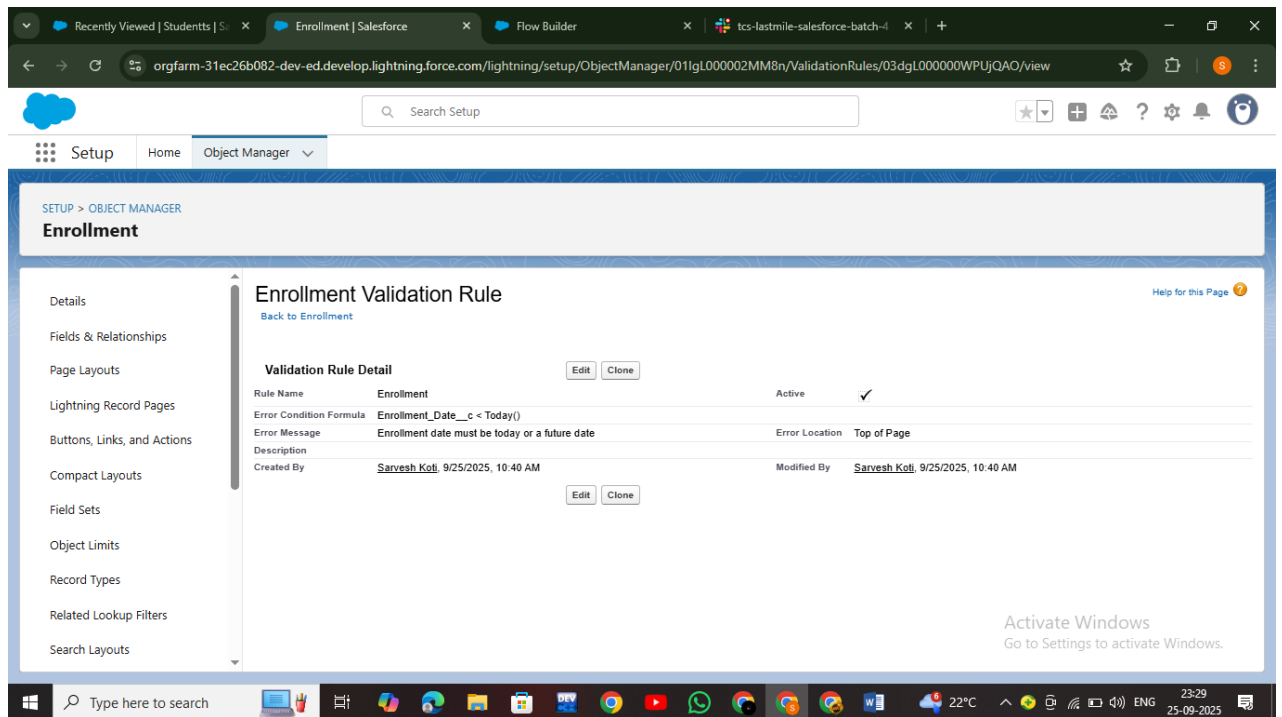


Phase 4: Process Automation and User Actions in Salesforce

1. Create Validation Rules

- Implement validation rules on objects like Enrollment or Fee to ensure data integrity.
- Example rules:
 - Enrollment date cannot be in the past.
 - Fee amount must be greater than zero.
- This improves data quality and prevents invalid entries.



2. Design Email Templates for Automation

- Create email templates for key automated notifications:
 - Admission Confirmation Email when student record is created.
 - Fee Reminder Email sent before fee due dates.
- Store these in an accessible folder (e.g., "Student CRM Notifications").

3. Build Record-Triggered Flows for Notifications

- Example: Admission Confirmation Flow

- Trigger: When a student record is created or admission status changes to "Confirmed".
- Action: Send admission confirmation email using your template.
- Update a confirmation checkbox field for tracking.
- Example: Fee Reminder Flow
 - Scheduled Path: Trigger flow to run a day or few days before fee due date.
 - Action: Send fee reminder email to student and parent.

4. Create Quick Actions for Frequent Tasks

- Define Quick Actions on key objects to simplify common user actions:
 - For Enrollment: "Mark as Completed" action that updates status to Completed.
 - For Fee: "Mark as Paid" action to update fee status.
- Add these Quick Actions to relevant page layouts for accessibility.

5. Testing and Validation

- Create sample student and enrollment records to test:
 - Automated confirmation emails post record creation.
 - Scheduled fee reminders sent correctly before due dates.
 - Quick Actions perform field updates with one click.
- Verify emails are received and records update accordingly.

Summary

Task	Object	Details
Validation Rules	Enrollment, Fee	Prevent past dates, zero fees
Email Templates	Student, Fee	Admission confirmation, fee reminders
Record-Triggered Flows	Student, Fee	Send emails, update confirmation checkboxes
Scheduled Flows	Fee	Reminder emails days before due date
Quick Actions	Enrollment, Fee	"Mark Completed", "Mark Paid" actions

Testing	All	Verify emails sent, updates applied, user action success
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Implementing these steps will automate key communications, simplify frequent updates, and prevent data errors, improving your CRM's efficiency and user experience in Salesforce.