

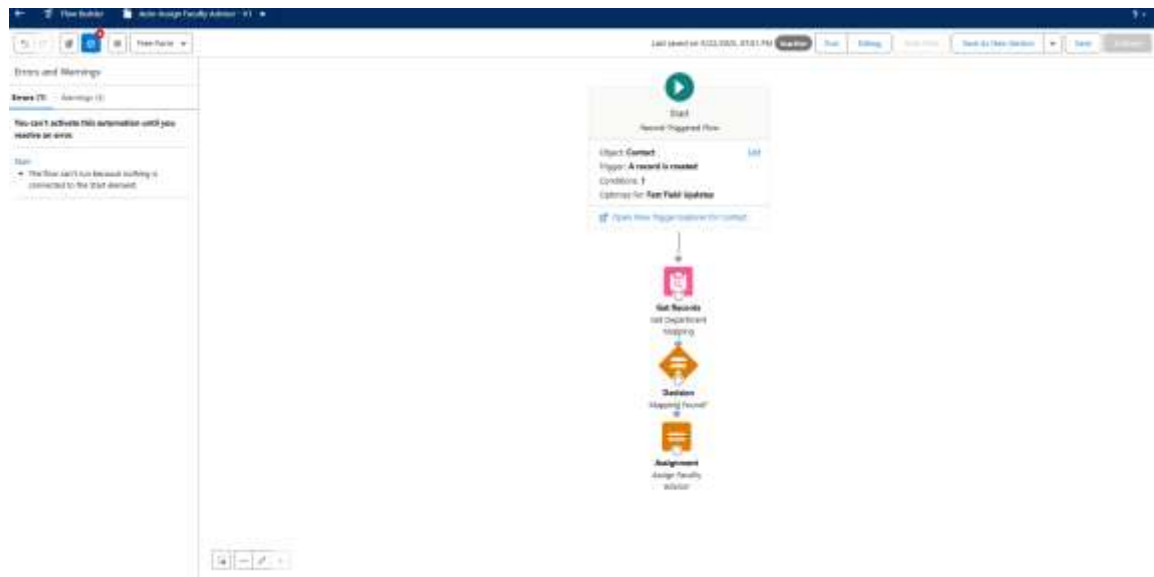
Phase 4: Process Automation (Admin)

In this phase, Salesforce automation tools are used to streamline student lifecycle processes. Since students and parents are records only, and faculty and placement cell are active users, automations are focused on faculty assignments, course enrollments, exam scheduling, result publishing, and validation rules to ensure data integrity.

1. Core Automation Requirements

1. Faculty Assignment:

- When a new Student (Contact) is created, auto-assign a Faculty Advisor based on Department.
- Tool: Record-Triggered Flow.



2. Data Validation:

- Prevent duplicate Roll Numbers.
- Ensure marks do not exceed maximum marks.
- Tool: Validation Rules.

2. Automation Tools

- Validation Rules → Enforce data quality (e.g., duplicate roll numbers).

This screenshot shows the Salesforce Setup interface for Matching Rules. The left sidebar contains a search bar with 'matching' and a navigation menu with 'Data', 'Duplicate Management', and 'Matching Rules'. The main content area is titled 'Matching Rules' and shows a detail view for a rule named 'Rule no duplication'. The rule is active and was created by Shree Raghavendra Reddy Komella on 9/23/2025 at 8:15 AM. The matching criteria are set to 'CONTACT: Roll_No EXACT MatchBlank = FALSE'.

Setup Home Object Manager

matching

Data

Duplicate Management

Matching Rules

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

Matching Rule

Rule no duplication

Help for this Page

Matching Rule Detail

Delete Clone Deactivate

Object: Contact

Rule Name: Rule no duplication

Unique Name: Rule_no_duplication

Description:

Matching Criteria: CONTACT: Roll_No EXACT MatchBlank = FALSE

Status: Active

Created By: Shree Raghavendra Reddy Komella 9/23/2025, 8:15 AM

Modified By: Shree Raghavendra Reddy Komella 9/23/2025, 8:15 AM

This screenshot shows the Salesforce Setup interface for Duplicate Rules. The left sidebar contains a search bar with 'duplicate' and a navigation menu with 'Data', 'Duplicate Management', 'Duplicate Error Logs', 'Duplicate Rules', and 'Matching Rules'. The main content area is titled 'Duplicate Rules' and shows a list view of duplicate rules. The first rule, 'Rule no Duplicate', is selected. The rule is active and was created by Shree Raghavendra Reddy Komella on 9/23/2025 at 8:18 AM. The matching criteria are set to 'CONTACT: Roll_No EXACT MatchBlank = FALSE'. The rule is marked as 'Matched'.

Setup Home Object Manager

duplicate

Data

Duplicate Management

Duplicate Error Logs

Duplicate Rules

Matching Rules

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

Contact Duplicate Rule

Rule no Duplicate

Help for this Page

Duplicate Rule Detail

Edit Delete Clone Deactivate

Order: 2 of 2 | Previous | Next

Rule Name: Rule no Duplicate

Description: Contact

Record Level Security: Enforce sharing rules

Action On Create: Block

Operations On Create: Alert Report

Action On Edit: Allow

Operations On Edit: Alert Report

Alert Text: Use one of these records?

Alert Type: Active

Matching Rule: ✓ Rule no match ✓ Matched

Matching Criteria: CONTACT: Roll_No EXACT MatchBlank = FALSE

Conditions:

Created By: Shree Raghavendra Reddy Komella 9/23/2025, 8:18 AM

Modified By: Shree Raghavendra Reddy Komella 9/23/2025, 8:18 AM

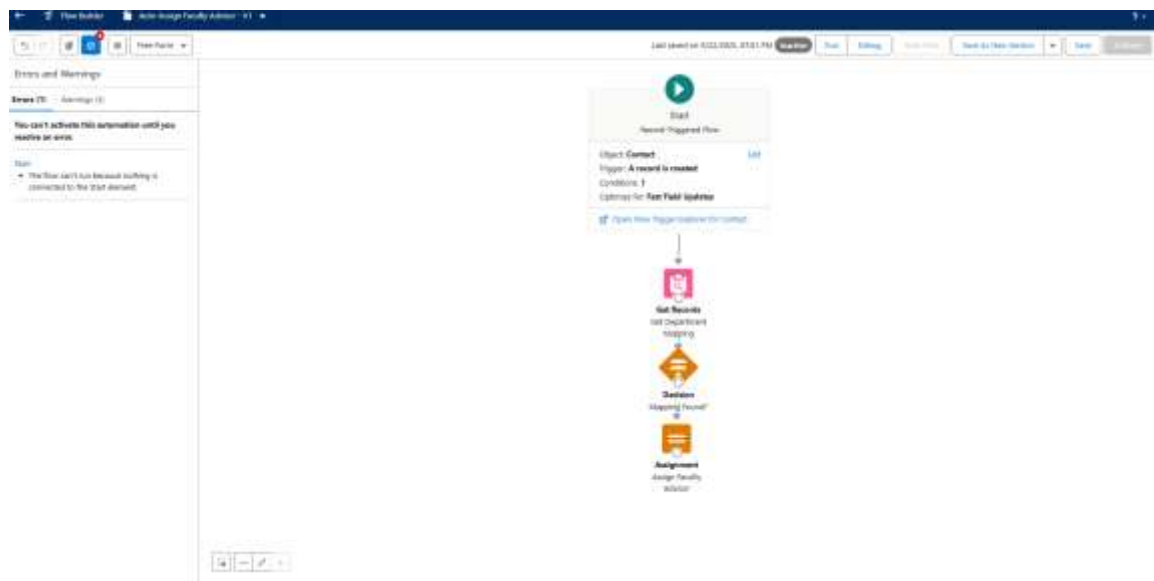
Edit Delete Clone Deactivate

- Flows → Recommended tool for automation:
 - Record-Triggered Flow → Assign faculty, notify placement cell.

3. Example Automations

Automation 1: Auto-Assign Faculty Advisor

- Trigger: Student (Contact) created.
- Logic: If Department = CSE → Assign Faculty Advisor = varaprasad
- Action: Update Student record with Advisor field.



Automation 3: Validation – Prevent Duplicate Roll No

- Rule: If another Contact exists with the same Roll No → block save.

Automation 4: Validation – Marks Validation

- Rule: Marks Obtained must be \leq Maximum Marks in the Exam.

4. Security in Automation

- Automations must respect user permissions.
- Only Faculty and Placement Users can trigger or execute actions.
- Use Permission Sets to control who can approve or trigger automation.
- Ensure sensitive data is only shared with Placement Cell and authorized faculty.

Outcome of Phase 4

At the end of Phase 4, the Salesforce University Org will:

- Automatically assign faculty advisors when students are created.
- Notify faculty on student course enrollments.

- Remind faculty of exam scheduling deadlines.
- Notify placement cell when results are published.
- Prevent invalid or duplicate data with validation rules.