

Phase 4: Process Automation (Admin)

In the AI Career Coach project, process automation helps streamline operations, reduce manual work, and ensure timely communication with students, instructors, and admins. Salesforce provides multiple automation tools to achieve this.

1. Validation Rules

- **Purpose:** Ensure data entered in Salesforce meets certain criteria before it is saved.
- **Use Case in AI Career Coach:**
 - Ensure students cannot register for courses without completing their profile.
 - Prevent score entry in assessments that exceeds the maximum possible marks.
- **Example Rule:**
- ISBLANK (Student_Email__c)

Error Message: “Email is required to register for a course.”

2. Workflow Rules

- **Purpose:** Automate standard internal procedures and actions based on specific criteria.
 - **Use Case in AI Career Coach:**
 - Send a welcome email when a student account is created.
 - Assign tasks to instructors when a new assessment is created.
 - **Components:**
 - **Criteria:** When a student enrolls in a course.
 - **Actions:** Send Email Alert, Update Field, Create Task.
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3. Process Builder

- **Purpose:** A visual tool to automate more complex processes with multiple if/then conditions.
 - **Use Case in AI Career Coach:**
 - Automatically update a student's progress when they complete a lesson.
 - Notify instructors if a student fails an assessment.
 - **Steps:**
 1. Select object (e.g., Student or Assessment).
 2. Define criteria (e.g., Assessment_Score__c < 50).
 3. Add actions: Send Email, Create Task, Update Record.
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4. Approval Process

- **Purpose:** Automate approval for records that need managerial or admin consent.
 - **Use Case in AI Career Coach:**
 - Approval required for instructors to publish a new course.
 - Scholarship requests by students require admin approval.
 - **Steps:**
 1. Select the object (e.g., Course__c).
 2. Define entry criteria (e.g., Status = Draft).
 3. Assign approver (e.g., Admin).
 4. Define approval actions (Send Email, Update Field).
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5. Flow Builder

- **Purpose:** Advanced automation tool with point-and-click interface, can replace Workflow & Process Builder.
- **Types & Use Cases in AI Career Coach:**
 1. **Screen Flow:** Collect additional student information via forms.
 - Example: Update career goals during onboarding.

2. **Record-Triggered Flow:** Trigger actions when a record is created or updated.
 - Example: Update student progress when assessment score is recorded.
 3. **Scheduled Flow:** Execute actions at a specific time.
 - Example: Send weekly progress summary emails to students.
 4. **Autolaunched Flow:** Triggered automatically without user input.
 - Example: Assign recommended courses to students based on their skill assessment.
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6. Email Alerts

- **Purpose:** Send automatic emails based on triggers.
 - **Use Case in AI Career Coach:**
 - Notify students about upcoming deadlines.
 - Inform instructors about new student enrollments.
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7. Field Updates

- **Purpose:** Automatically update fields when certain criteria are met.
 - **Use Case in AI Career Coach:**
 - Update student status to “Completed” when all lessons are finished.
 - Update course popularity count when a new student enrolls.
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8. Tasks

- **Purpose:** Automate task assignment for users.
- **Use Case in AI Career Coach:**

- Assign follow-up tasks to instructors after a student completes an assessment.
- Remind admin to review feedback submitted by students.

9. Custom Notifications

- **Purpose:** Send in-app notifications to users for critical updates.
- **Use Case in AI Career Coach:**
 - Notify instructors when a student completes a lesson or requests support.
 - Alert students when a new course matching their interests is available.

Validation Rule

Rule Name

Vaildate_Course_Registration

Error▼

Description

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ISBLANK(Student_Email__c))

Error Condition Formula

Error Message

Email is required to register for a course.

Cancel

Save