

Phase 4: Process automation (Flows, Validation, Approvals)

Project Title: Student Success & Career Guidance Portal

- Use **Flow Builder** for modern automations (prefer over Process Builder).

4.1 Validation Rules (examples)

1. **Contact** → *Validation Rules* → **New**

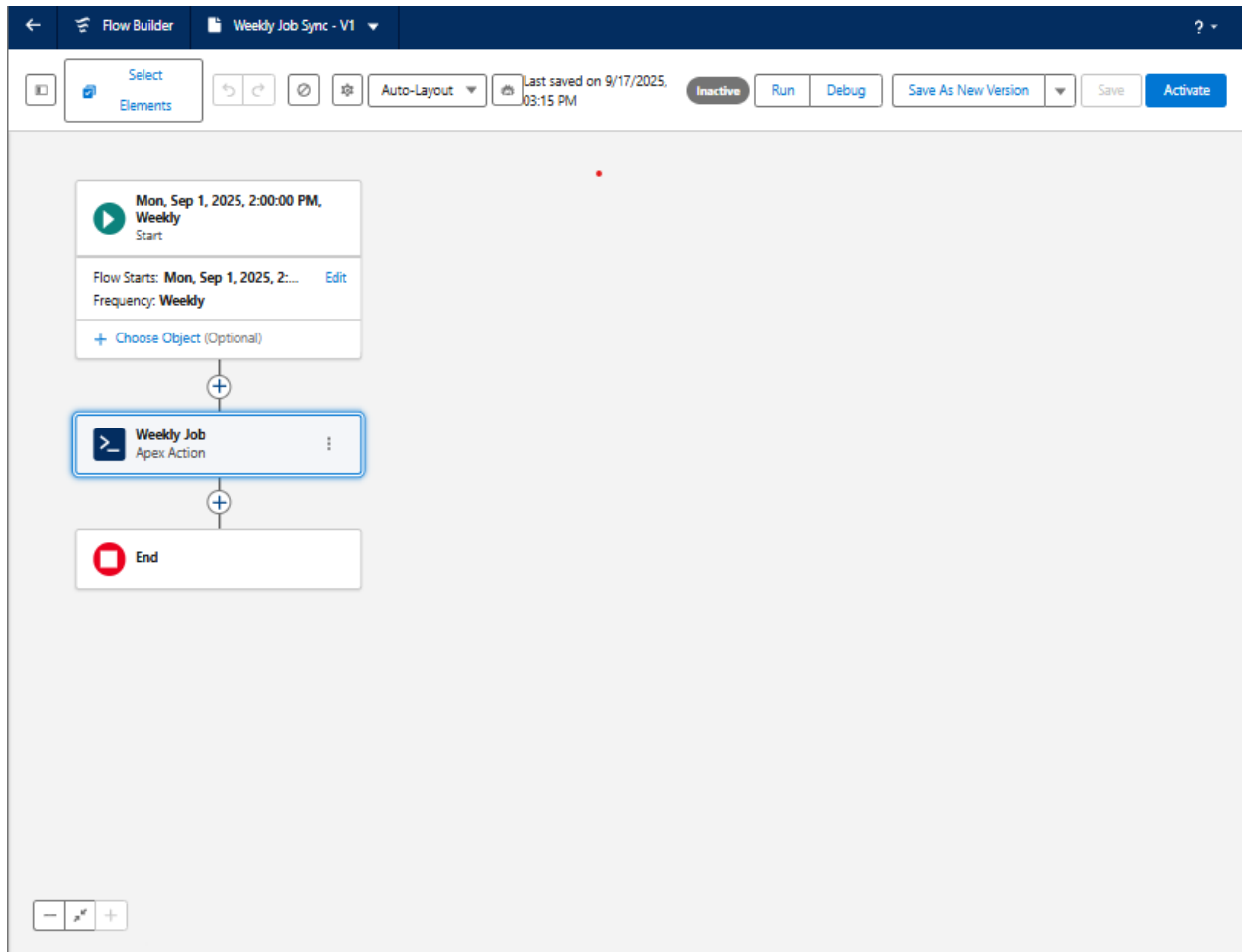
- Rule: GPA__c >= 0 && GPA__c <= 10
- Formula: OR(GPA__c < 0, GPA__c > 10)
- Error message: “Enter GPA between 0 and 10.”

The screenshot shows the Salesforce Validation Rule Editor interface. The left sidebar contains a navigation menu with options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Hierarchy Columns, Scoping Rules, Object Access, Triggers, Flow Triggers, and Validation Rules (which is currently selected). The main area is titled 'Validation Rule Edit' and shows a rule named 'GPA_Check' that is active. The 'Error Condition Formula' section contains the formula: `OR (GPA__c < 0, GPA__c > 10)`. A 'Functions' panel on the right lists various functions like ABS, ACOS, ADDMONTHS, AND, ASC, ASIN, etc. The 'Error Message' section shows the message: 'Enter GPA between 0 and 10'. The 'Error Location' is set to 'Field' and 'GPA__c'. At the bottom, there are buttons for 'Save', 'Save & New', and 'Cancel'.

4.2 Scheduled Flow — Weekly job aggregator

- ##### 1. **New** → **Schedule-Triggered Flow** → run weekly.

2. Action: call an **Apex Action** (Batch job) or External Service to fetch jobs, create Job_Post__c records.



4.3 Approval Process (resume approval)

1. **Setup** → *Process Automation* → **Approval Processes** → New → **Jump Start Wizard**
2. Object: Contact.
3. **Name:**
 - Process Name: Student Resume Approval
 - Unique Name: Student_Resume_Approval
4. **Entry Criteria:**
 - Field: Resume_Submitted__c (Checkbox)
 - Operator: Equals
 - Value: TRUE

5. **Approver:** Select **Automatically assign to user** → Pick your **Placement Officer** user.
6. **Email Template:** You can skip or create a quick text-based template under Setup → Classic Email Templates.
7. **Initial Submission Action:** Field Update → set Resume_Status__c = Submitted
8. **Final Approval Action:** Field Update → Resume_Status__c = Approved.
9. **Final Rejection Action:** Field Update → Resume_Status__c = Rejected.
10. **Save** → Activate

Process Definition Detail

Process Name: Student Resume Approval | Edit | Clone | Deactivate | Active: ☒

Unique Name: Student_Resume_Approval | Next Automated Approver Determined By: ☐

Description: Contact: Resume Submitted EQUALS True

Entry Criteria: Administrator ONLY | Allow Submitters to Recall Approval Requests: ☐

Record Editability: Administrator ONLY

Approval Assignment Email Template: ☐

Initial Submitters: Contact Owner

Created By: Sarvam Tennakoti 9/17/2025, 11:40 AM | Modified By: Sarvam Tennakoti 9/17/2025, 12:09 PM

Initial Submission Actions

Action	Type	Description
Record Lock	Record Lock	Lock the record from being edited
Field Update	Field Update	Resume Submitted

Approval Steps

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
Step 1	1	Step 1			User: Sarvam Tennakoti	Final Rejection

Final Approval Actions

Action	Type	Description
Record Lock	Record Lock	Lock the record from being edited
Field Update	Field Update	Resume Approved

Final Rejection Actions

Action	Type	Description
Record Lock	Record Lock	Unlock the record for editing

4.4 Email Templates & Notifications

❖ Lightning templates.

1. In your org, click App Launcher → Search "Email Templates" → New Email Template
2. Fill details:
 - **Name:** Placement_Ready_Notification.
 - **Related Entity Type:** Contact (since student is a Contact).
 - **Subject:** Student {{Recipient.Name}} is Placement Ready
 - **Folder:** Keep in Public Email Templates or create a folder Placement Notifications.
 - **In Email Content (HTML):**

```

Hello {{Recipient.FirstName}},

Student {{Contact.Name}} from {{Contact.Account.Name}} has been marked as
Placement Ready.
```

Career Readiness Score: {{Contact.Career_Readiness__c}}

Please review their profile and recommend to recruiters.

Regards,

Student Success Portal

3. Save

The screenshot shows the Salesforce Email Template Builder interface. At the top, there's a navigation bar with 'Student Success' and various menu items like Home, Reports, Dashboards, Contacts, Students, and Internships. A search bar is also present. Below the navigation bar, the title 'Email Template Placement_Ready_Notification' is displayed with 'Edit', 'Clone', and 'Delete' buttons. The main content area is divided into 'Details' and 'Related' tabs. Under 'Details', there are sections for 'Information' and 'Message Content'. The 'Information' section includes fields for 'Email Template Name' (Placement_Ready_Notification), 'Description', 'Made in Email Template Builder' (checkbox), 'Related Entity Type' (Contact), and 'Folder' (Public Email Templates). The 'Message Content' section includes fields for 'Subject' (Student {{Recipient.Name}} is Placement Ready), 'Enhanced Letterhead', 'HTML Value' (Hello {{Recipient.FirstName}}, Student {{Contact.Name}} from {{Contact.Account.Name}} has been marked as Placement Ready. Career Readiness Score: {{Contact.Career_Readiness__c}}. Please review their profile and recommend to recruiters. Regards, Student Success Portal), and 'Additional Information' (Created By: Swayam Tamrakar, 9/17/2025, 11:01 AM; Last Modified By: Swayam Tamrakar, 9/17/2025, 11:09 AM). At the bottom, there are links for 'Recent Items' and 'History'.

Information	
Email Template Name	Placement_Ready_Notification
Description	
Made in Email Template Builder	<input type="checkbox"/>
Related Entity Type	Contact
Folder	Public Email Templates


Message Content	
Subject	Student {{Recipient.Name}} is Placement Ready
Enhanced Letterhead	
HTML Value	Hello {{Recipient.FirstName}}, Student {{Contact.Name}} from {{Contact.Account.Name}} has been marked as Placement Ready. Career Readiness Score: {{Contact.Career_Readiness__c}} Please review their profile and recommend to recruiters. Regards, Student Success Portal

Additional Information	
Created By	Swayam Tamrakar, 9/17/2025, 11:01 AM
Last Modified By	Swayam Tamrakar, 9/17/2025, 11:09 AM

4.5 Workflow Rules, Field Updates & Tasks

1. Setup → Quick Find → Workflow Rules → New Rule.
2. Choose Object = Contact.
3. Rule Name = High GPA Alert.
4. Evaluation Criteria = "created, and every time it's edited to meet criteria".
5. Rule Criteria → Example: GPA__c >= 9.

6. Save

 **Workflow Rules**

Edit Rule High GPA Alert

Enter the name, description, and criteria to trigger your workflow rule. In the next step, associate workflow actions with this workflow rule.

Save

Cancel

Edit Rule

Object

Contact

Rule Name

High GPAAlert

Description

Evaluation Criteria

Evaluate the rule when a record is:

☐ created

☐ created, and every time it's edited

☒ created, and any time it's edited to subsequently meet criteria

How do I choose?

Rule Criteria

Run this rule if the

criteria are met

:

Field	Operator	Value	
Contact: GPA	greater than	9	AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND

Add Filter Logic...

Save

Cancel

7. Add Workflow Action → choose:

- New Email Alert (send an email to Placement Officer).
- New Field Update (set Placement_Ready__c = TRUE).
- New Task (assign follow-up task to Placement Officer).

8. Activate the workflow rule.

The screenshot shows the Salesforce Setup page for Workflow Rules. The header includes the 'SETUP' logo and 'Workflow Rules'. Below this, the specific rule 'High GPA Alert' is selected. A yellow banner at the top right encourages using Flow Builder. The 'Workflow Rule Detail' section shows the rule is active, with buttons for 'Edit', 'Clone', and 'Deactivate'. It lists the rule name, object (Contact), evaluation criteria, and creation/modification details. The 'Workflow Actions' section shows immediate actions: 'Review Student for Placement Readiness', 'Email alert to placement officer', and 'Field Update'. A warning message states that new time triggers cannot be added to an active rule.

Workflow Rule Detail [Edit](#) [Clone](#) [Deactivate](#)

Rule Name	High GPA Alert	Object	Contact
Active	<input checked="" type="checkbox"/>	Evaluation Criteria	Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria
Description			
Rule Criteria	Contact: GPA GREATER THAN 9		
Created By	Swayam Tamrakar, 9/18/2025, 12:42 PM		Modified By
			Swayam Tamrakar, 9/18/2025, 12:57 PM

Workflow Actions [Edit](#)

Immediate Workflow Actions

Type	Description
Task	Review Student for Placement Readiness
Email Alert	Email alert to placement officer
Field Update	Field Update

Time-Dependent Workflow Actions [See an example](#)

You cannot add new time triggers to an active rule. [Deactivate This Rule](#)

[Edit](#)

4.6 Process Builder

1. **Setup** → Quick Find → **Process Builder** → New.
2. Name: Student Placement Process.
3. Object: **Contact**. Start the process "when a record changes".
4. Criteria: GPA__c >= 8 AND Placement_Status__c = 'Not Ready'.
5. Actions:
 - **Immediate Action** → Update Records → Set Placement_Status__c = Ready.
 - **Immediate Action** → Send Alert → High GPA Alert

6. Activate process.

