

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**

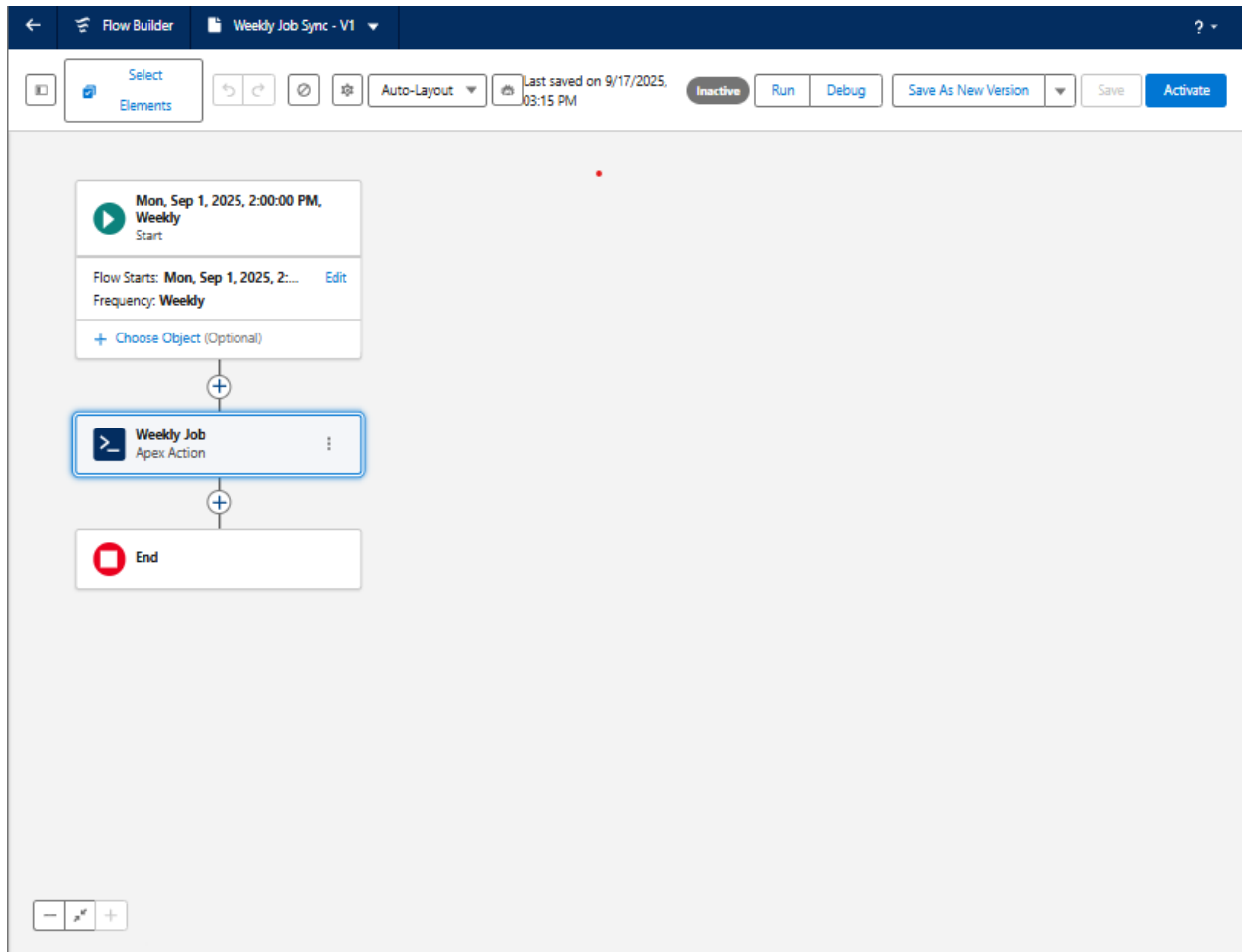
- Rule: GPA__c >= 0 && GPA__c <= 10
- Formula: OR(GPA__c < 0, GPA__c > 10)
- Error message: “Enter GPA between 0 and 10.”

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)`. To the right of the formula is a 'Functions' panel with a list of functions including ABS, ACOS, ADDMONTHS, AND, ASCII, ASIN, and ABS(number). The 'Error Message' section shows an example message: 'Discount percent cannot exceed 30%'. Below this, the 'Error Message' field contains the text: 'Enter GPA between 0 and 10'. The 'Error Location' is set to 'Field' and 'GPA'. At the bottom right, there is a 'Print' button.

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 Re-Call 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), 'Folder' (Public Email Templates), and 'Enhanced Letterhead'. The 'Message Content' section shows the subject line 'Student {{Recipient.Name}} is Placement Ready' and the body text: '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'. At the bottom, the 'Additional Information' section shows 'Created By' (Swayam Tamrakar, 9/17/2025, 11:01 AM) and 'Last Modified By' (Swayam Tamrakar, 9/17/2025, 11:09 AM). A footer bar at the very bottom contains 'Recent Items' and 'History' links.

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 GPA Alert

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.

 **Workflow Rules**

Workflow Rule

High GPA Alert

Help for this Page

Go with the flow! With Flow Builder, the future of low-code automation, you can do everything you do with workflow rules — and more! Salesforce plans to retire workflow rules and recommends building automation in Flow Builder. [Tell Me More](#) | [Migrate your workflow rules to flows](#)

Workflow Rule Detail

EditCloneDeactivate

Rule Name	High GPA Alert	Object	Contact
Active	✓	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