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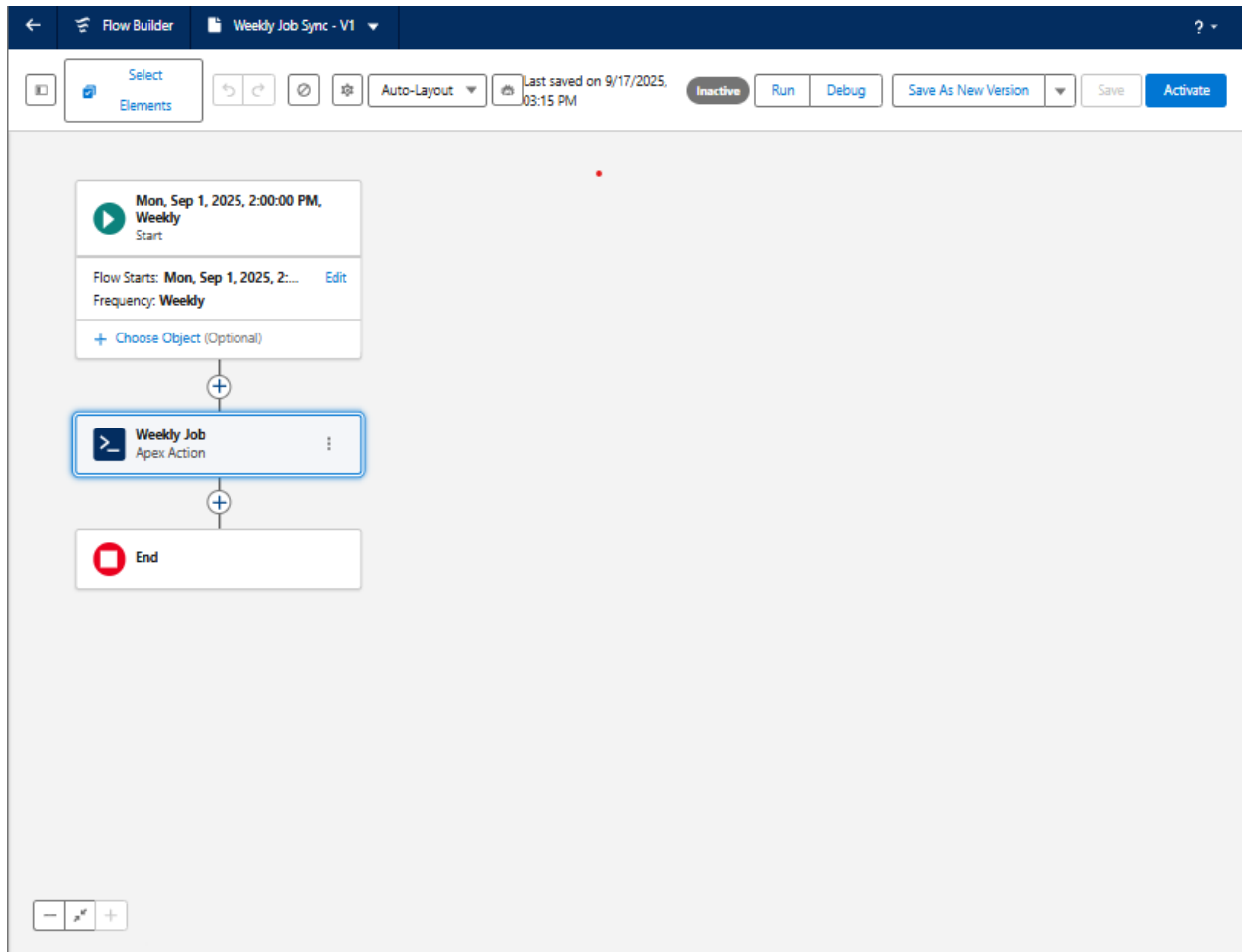
1. **Contact** → *Validation Rules* → **New**

   - Rule: GPA__c >= 0 && GPA__c <= 10

   - Formula: OR(GPA__c < 0, GPA__c > 10)

   - Error message: "Enter GPA between 0 and 10."

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

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**

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**

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 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   [Edit] [Clone] [Deactivate]

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]