

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**

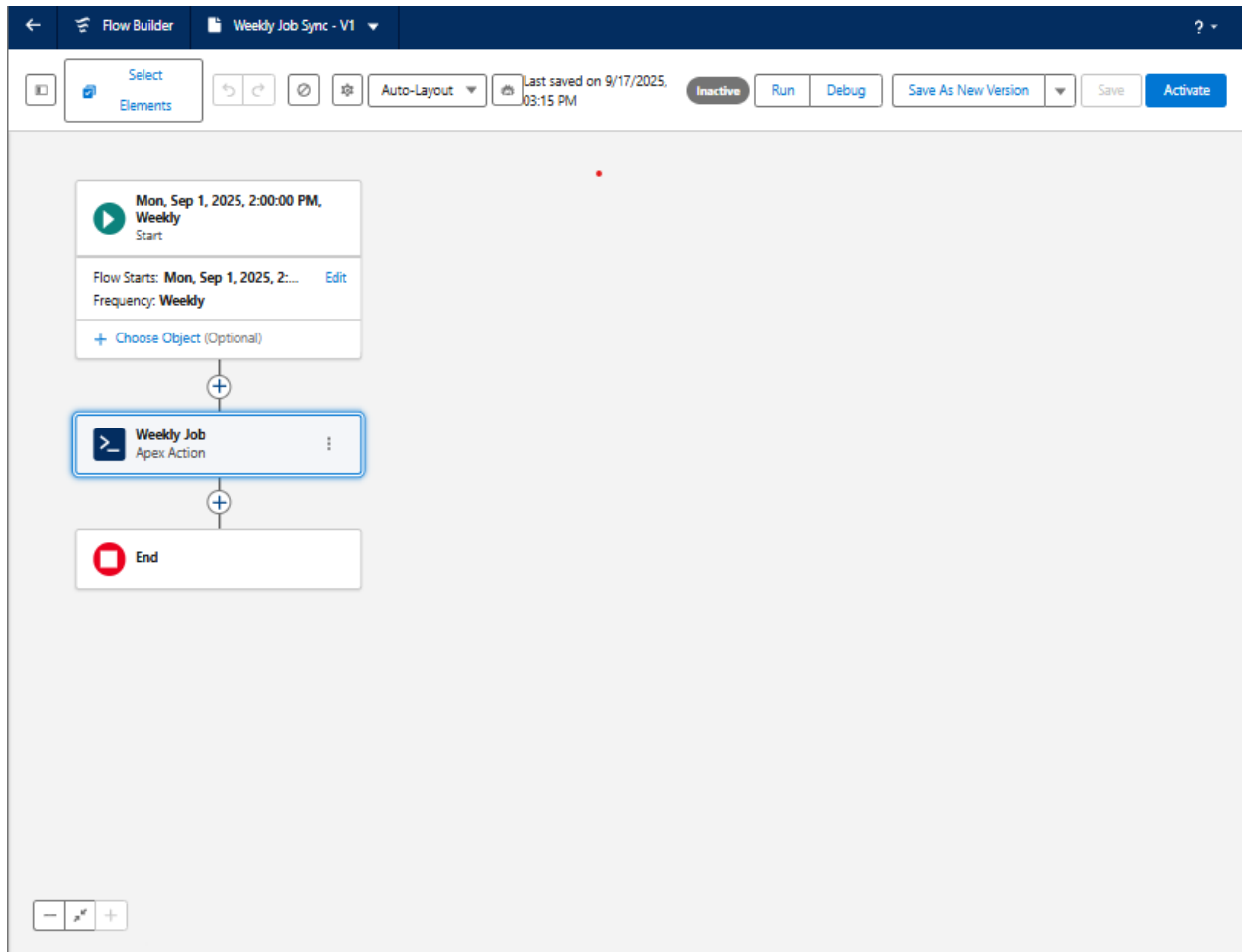
- Rule: GPA__c >= 0 && GPA__c <= 10
- Formula: OR(GPA__c < 0, GPA__c > 10)
- Error message: “Enter GPA between 0 and 10.”

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)`. Below this is a 'Check Syntax' button. The 'Error Message' section shows an example message: 'Discount percent cannot exceed 30%'. 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, 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

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

Student Success

Home

Home

Reports

Dashboards

Contacts

Students

Internships

Placement Ready Notifica...

More

Search...

Email Template

Placement Ready Notification

Edit

Clone

Delete

Details

Related

Information

Email Template Name

Placement Ready Notification

Description

Made in Email Template Builder

☐

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

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