

Phase 4: Process Automation (Campus CRM + Student Club)

Screenshots:-

Validation Rules:-

Club:-

This screenshot shows the Salesforce Lightning Setup page for a 'Club Event Validation Rule'. The page is titled 'Club Event Validation Rule' and includes a 'Back to Club Event' link. The left sidebar contains a navigation menu with options like 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, Restriction Rules, Scoping Rules, Object Access, Triggers, and Flow Triggers. The main content area displays the 'Validation Rule Detail' for the 'Event_Date_Check' rule. The rule is active and has the condition formula 'DATEVALUE(Event_Date__c) < TODAY()'. The error message is 'Event date cannot be in the past'. The error location is 'Top of Page'. The rule was created by Adarsh Prajapati on 9/24/2025 at 7:01 AM and was modified by the same user on 9/24/2025 at 7:01 AM. The bottom of the page shows a Windows taskbar with various application icons and a system tray displaying the date and time as 9:46 PM on 9/25/2025.

This screenshot shows the Salesforce Lightning Setup page for a 'Club Event Validation Rule'. The page is titled 'Club Event Validation Rule' and includes a 'Back to Club Event' link. The left sidebar contains a navigation menu with options like 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, Restriction Rules, Scoping Rules, Object Access, Triggers, and Flow Triggers. The main content area displays the 'Validation Rule Detail' for the 'Event_Registration_Deadline' rule. The rule is active and has the condition formula 'TODAY() > DATEVALUE(Registration_Deadline__c)'. The error message is 'Cannot register after the registration deadline.' The error location is 'Top of Page'. The rule was created by Adarsh Prajapati on 9/24/2025 at 6:58 AM and was modified by the same user on 9/24/2025 at 6:58 AM. The bottom of the page shows a Windows taskbar with various application icons and a system tray displaying the date and time as 9:46 PM on 9/25/2025.

Home | Sale | Welcome_N | Process Buil | Object Man | Email Alerts | Club Membr | You're Invit | CampusConn | New Tab | + | - | X

orgfarm-047cdd0cc8-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgl000002Lkuk/ValidationRules/03dgl000000VqC1QAK/view

Setup Home Object Manager

Club Membership

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

Restriction Rules

Club Membership Validation Rule

Back to Club Membership

Validation Rule Detail

Rule Name	Prevent_Duplicate_Membership	Active	✓
Error Condition Formula	Duplicate__c = TRUE		
Error Message	This student is already a member of this club.	Error Location	Top of Page
Description	Prevent a student from joining the same club twice		
Created By	Adarsh Prajapati: 9/24/2025, 5:41 AM	Modified By	Adarsh Prajapati: 9/24/2025, 5:41 AM

26°C Haze 9:47 PM 9/25/2025

Email Confirmation Received:-

Home | Sale | Welcome_N | Process Buil | Object Man | Email Alerts | Email Alerts | You're Invit | CampusConn | New Tab | + | - | X

mail.google.com/mail/u/0/?tab=rm&ogblFinbox/FMfcgZCqpwGZCHJDqjBnpzCqLvMW

Gmail

Compose

Inbox 336

Starred

Snoozed

Sent

Drafts 1

More

Labels +

Upgrade

2 of 390

You're Invited! 🎉 Check Out the Newest Event from Our Club!

Inbox x

Adarsh Prajapati adarsh.prajapati.cs22@ggits.net via izexihobydjgl-bmrpuar.can98.bnc.salesforce.com to adarsh.prajapati.cs22@ggits.net, arush2773@gmail.com, prajapatiadarsh25@gmail.com, arushi.verma.cs22@ggits.net, me 12:25 PM (9 hours ago)

Hi everyone, 🌟

We're thrilled to announce that a new event has just been created for all our amazing club members!

Get ready for an exciting opportunity to connect, have fun, and make some great memories. We've been working hard to put together something special, and we can't wait for you to be a part of it.

More details about the event (like the theme, date, time, and location) will be shared very soon, so please keep an eye on your inbox! 📧

We look forward to seeing you there! 🎉

Best regards,

CampusConnect

Reply Reply all Forward

26°C Haze 9:48 PM 9/25/2025

Process Builder:-

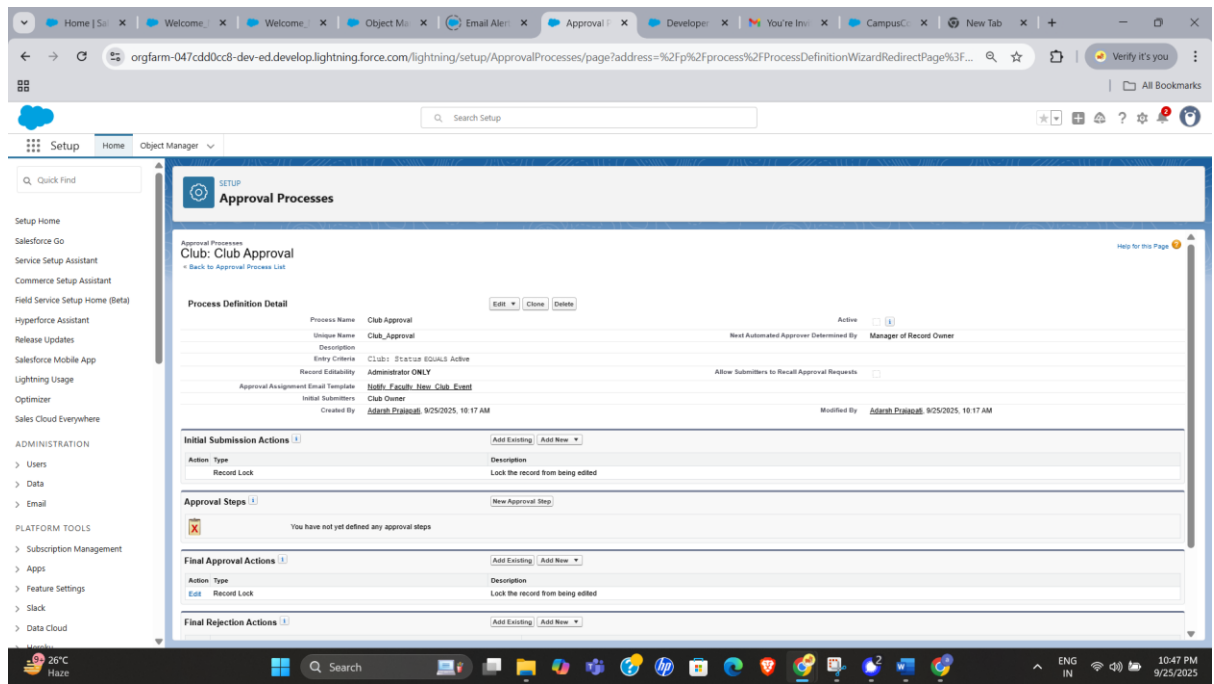
On New Event Creation:-

The screenshot shows the Salesforce Process Builder interface for a process named "Notify Faculty New Event". The process flow starts with a "START" node, followed by a "Club Event" object node. A decision diamond labeled "Event Created" follows. If the condition is TRUE, the process proceeds to "IMMEDIATE ACTIONS" (containing "Send Event Notification") and then "SCHEDULED ACTIONS" (containing "Set Schedule"), finally leading to a "STOP" node. If the condition is FALSE, the process proceeds to "Add Criteria", then "IMMEDIATE ACTIONS", "SCHEDULED ACTIONS", and finally to another "STOP" node. The right-hand panel, titled "Define Criteria for this Action Group", shows the criteria name "Event_Created". The criteria for executing actions are defined as: "Conditions are met", "Formula evaluates to true", and "No criteria—just execute the actions!". The "Set Conditions" section shows a single condition: "[Event_c] Status_c" equals "Picklist" and is "Active". The "Conditions" section indicates that all conditions are met (AND) or any of the conditions are met (OR).

On New Club Member Registered:-

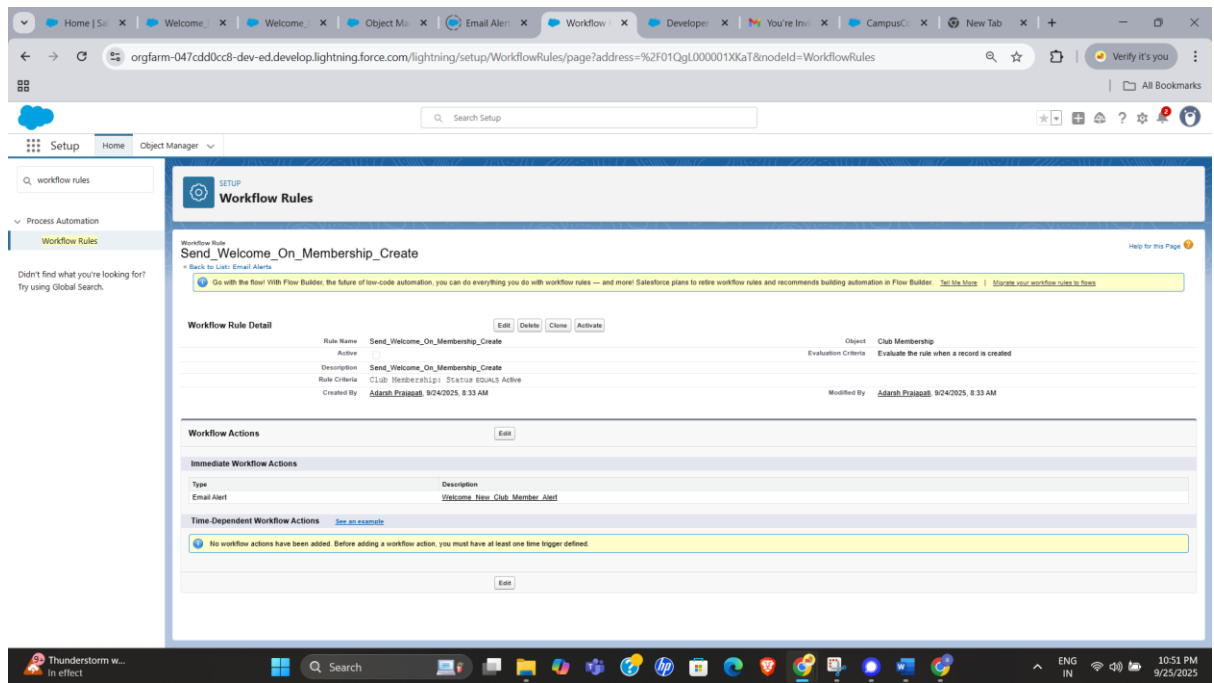
The screenshot shows the Salesforce Process Builder interface for a process named "Welcome New Club Member". The process flow starts with a "START" node, followed by a "Club Membership" object node. A decision diamond labeled "Membership Active" follows. If the condition is TRUE, the process proceeds to "IMMEDIATE ACTIONS" (containing "Send Welcome Email") and then "SCHEDULED ACTIONS", finally leading to a "STOP" node. If the condition is FALSE, the process proceeds to "Add Criteria", then "IMMEDIATE ACTIONS", "SCHEDULED ACTIONS", and finally to another "STOP" node. The right-hand panel, titled "Define Criteria for this Action Group", shows the criteria name "Membership_Active". The criteria for executing actions are defined as: "Conditions are met", "Formula evaluates to true", and "No criteria—just execute the actions!". The "Set Conditions" section shows a single condition: "[Club_Membership] Status" equals "Picklist" and is "Active". The "Conditions" section indicates that all conditions are met (AND) or any of the conditions are met (OR).

Approval Process:-



The screenshot shows the Salesforce Setup interface for the 'Approval Processes' page. The browser address bar displays the URL: `orgfarm-047cdd0cc8-dev-ed.develop.lightning.force.com/lightning/setup/ApprovalProcesses/page?address=%2Fp%2Fprocess%2FProcessDefinitionWizardRedirectPage%3F...`. The left sidebar contains navigation links such as 'Setup Home', 'Salesforce Go', 'Service Setup Assistant', 'Commerce Setup Assistant', 'Field Service Setup Home (Beta)', 'Hyperforce Assistant', 'Release Updates', 'Salesforce Mobile App', 'Lightning Usage', 'Optimizer', 'Sales Cloud Everywhere', 'ADMINISTRATION', 'PLATFORM TOOLS', and 'Data Cloud'. The main content area is titled 'Approval Processes' and shows the configuration for a process named 'Club: Club Approval'. The 'Process Definition Detail' section includes fields for 'Process Name', 'Unique Name', 'Description', 'Entry Criteria', 'Record Editability', 'Approval Assignment Email Template', 'Initial Submitters', and 'Created By'. The 'Initial Submission Actions' section shows a table with columns for 'Action Type' and 'Description'. The 'Approval Steps' section indicates that no steps have been defined yet. The 'Final Approval Actions' and 'Final Rejection Actions' sections also show tables for defining actions. The bottom of the screen displays the Windows taskbar with the date and time as 10:47 PM on 9/25/2025.

Workflow Rules:-



The screenshot shows the Salesforce Setup interface for the 'Workflow Rules' page. The browser address bar displays the URL: `orgfarm-047cdd0cc8-dev-ed.develop.lightning.force.com/lightning/setup/WorkflowRules/page?address=%2F01QgLO00001XKaT8&model=WorkflowRules`. The left sidebar contains navigation links such as 'Setup Home', 'Salesforce Go', 'Service Setup Assistant', 'Commerce Setup Assistant', 'Field Service Setup Home (Beta)', 'Hyperforce Assistant', 'Release Updates', 'Salesforce Mobile App', 'Lightning Usage', 'Optimizer', 'Sales Cloud Everywhere', 'ADMINISTRATION', 'PLATFORM TOOLS', and 'Data Cloud'. The main content area is titled 'Workflow Rules' and shows the configuration for a rule named 'Send_Welcome_On_Membership_Create'. The 'Workflow Rule Detail' section includes fields for 'Rule Name', 'Rule Criteria', 'Object', 'Evaluation Criteria', 'Created By', and 'Modified By'. The 'Workflow Actions' section shows a table with columns for 'Type' and 'Description'. The 'Immediate Workflow Actions' section shows a table with columns for 'Type' and 'Description'. The 'Time-Dependent Workflow Actions' section indicates that no actions have been added yet. The bottom of the screen displays the Windows taskbar with the date and time as 10:51 PM on 9/25/2025.

Documentation:-

Validation Rules

- **Purpose:** Ensure data quality by preventing invalid records.
 - **Implemented Rules:**
 - **ClubEvent__c:** Event_DateTime__c must be greater than today.
 - **ClubMembership__c:** Joining_Date__c cannot be a future date.
 - **Student (Contact):** Year__c must be between 1 and 4 for UG Students.
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Workflow Rules

- **Purpose:** Automate single-step actions (legacy tool, but implemented for demonstration).
- **Implemented:**
 - **Object:** ClubMembership__c
 - **Trigger:** When a new membership is created.
 - **Action:** Email alert to Student and Faculty Advisor.
- **Email Template Used:** *Welcome_New_Club_Member*

Subject

!!Welcome to our club!!

HTML Value

Congratulations

You successfully joined welcome to our club.

We're excited to have you on board. Check out the upcoming events and stay engaged with your club activities.

Here are a few things you can do next:

- View upcoming events in your CampusConnect dashboard
- Track your participation in club activities
- Stay connected with fellow members

Best regards,
CampusConnect Team.

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Process Builder

- **Purpose:** Automate multi-step updates and actions (used in Developer Org as Flow alternative).
- **Implemented:**
 - **Object:** ClubEvent__c

- **Trigger:** When a new ClubMembership__c record is created.
 - **Action:** Increment Registration_Count__c field on ClubEvent__c.
 - **Optional Extension:** Could update Student participation history, but not implemented to keep scope focused.
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Approval Process

- **Purpose:** Route records for approval (used for structured decision-making).
 - **Not Implemented:** Developer Org limitation for practical demonstration.
 - **Explained as Theory:**
 - Would apply on **ClubEvent__c** where Status__c = "Planned".
-

Flow Builder

- **Purpose:** Advanced automation (preferred over Process Builder).
 - **Implemented:**
 - **Record-Triggered Flow:** On creation of ClubMembership__c → Send Welcome Email.
 - **Explained (Not Implemented due to scope):**
 - **Screen Flow:** Could be used for Event Quick Registration form.
 - **Auto-Launched Flow:** Could perform bulk updates on event status.
-

Email Alerts

- **Purpose:** Send notifications via pre-defined templates.
 - **Implemented:**
 - **Welcome Email for new Club Membership.**
 - **Event Reminder Email for upcoming events.**
 - **Additional Emails Configured:** Sent to Faculty Advisor, Club Leader, and Student simultaneously.
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Field Updates

- **Purpose:** Auto-update field values when conditions are met.
 - **Implemented:**
 - On Membership Creation → Membership_Status__c set to "Active".
 - On Event Date Passing → Status__c auto-updated to "Completed".
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Tasks

- **Purpose:** Create to-do items for Users.
 - **Implemented:**
 - When a new ClubEvent__c is created → Task assigned to Club Leader: *"Promote Event and Confirm Venue."*
 - **Future Extension:** Could assign follow-up tasks to Faculty after event completion.
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Custom Notifications

- **Purpose:** Send in-app or push notifications.
 - When a Student registers for an Event → Club Leader receives push notification in Salesforce Mobile App.
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Key Outcomes of Phase 4

- Automated core processes like membership welcome emails, event registration tracking, and event reminders.
- Ensured data accuracy with validation rules.
- Demonstrated both legacy (Workflow, Process Builder) and modern (Flow Builder) approaches.
- Approval Process and Custom Notifications.