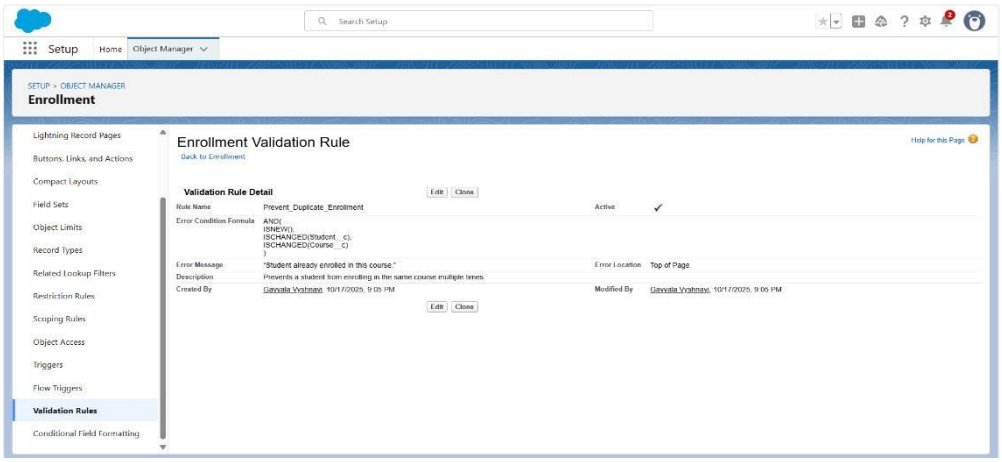
Phase 4: Process Automation (Admin)

Goal: The goal of this phase is to automate repetitive administrative tasks in the **Institute Management System**. Using Salesforce automation tools, we ensure student records are accurate, status updates are automatic, reminders are sent on time, and approval requests are streamlined without manual effort.

1. Validation Rules

Object: Enrollment__c

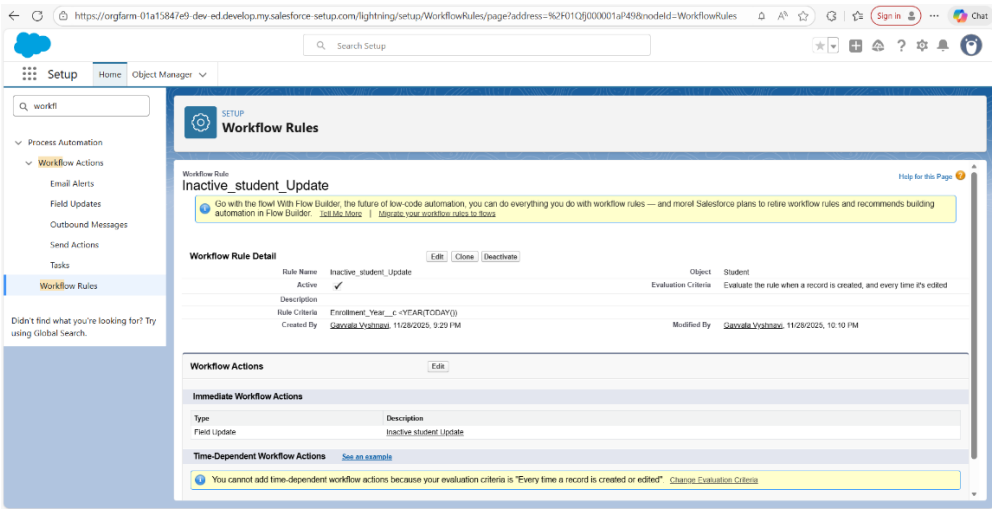
- **Rule:** Prevents duplicate enrollments for the same student and course.
- **Condition:** AND (ISNEW(), ISCHANGED(Student__c), ISCHANGED(Course__c)
- **Error Message:** “Student already enrolled in this course.”

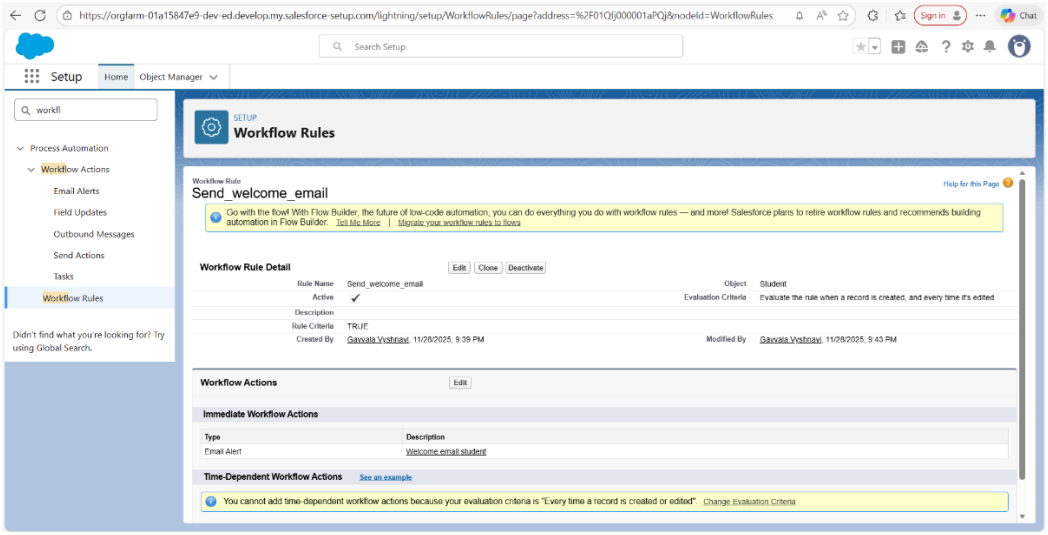


2. Workflow Rules

Object: Student__c

- **Rule Name:** Inactive Student Update
- **Criteria:** Enrollment_Year__c <YEAR(TODAY())
- **Action:** Field Update → Status__c = "Inactive"

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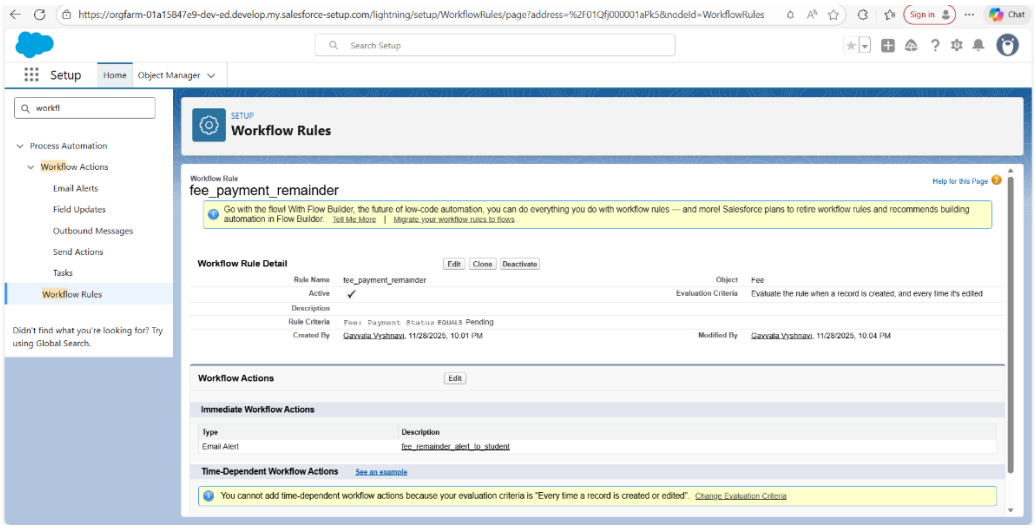
Workflow Actions
Email Alerts
Field Updates
Outbound Messages
Send Actions
Tasks
Workflow Rules
Didn't find what you're looking for? Try using Global Search.
SETUP
Workflow Rules
Workflow Rule
Send_welcome_email
Help for this Page
Go with the flow! With Flow Builder, the future of low-code automation, 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
Send_welcome_email
Object
Student
Active
Evaluation Criteria
Evaluate the rule when a record is created, and every time it's edited
Description
Rule Criteria
TRUE
Created By
Gayyala Vyshnavi, 11/28/2025, 9:39 PM
Modified By
Gayyala Vyshnavi, 11/28/2025, 9:43 PM
Workflow Actions
Edit
Immediate Workflow Actions
Type
Description
Email Alert
Welcome email student
Time-Dependent Workflow Actions
See an example
You cannot add time-dependent workflow actions because your evaluation criteria is "Every time a record is created or edited". Change Evaluation Criteria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Email Alerts
Field Updates
Outbound Messages
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Workflow Rules
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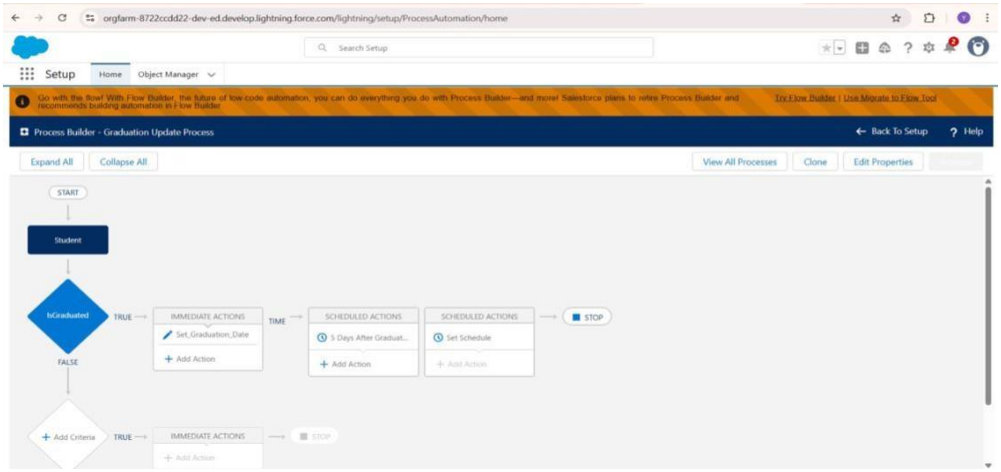
Workflow Rule Detail
Edit
Clone
Deactivate
Rule Name
fee_payment_remainder
Object
Fee
Active
Evaluation Criteria
Evaluate the rule when a record is created, and every time it's edited
Description
Rule Criteria
Fee: Payment Status EQUALS Pending
Created By
Gayyala Vyshnavi, 11/28/2025, 10:01 PM
Modified By
Gayyala Vyshnavi, 11/28/2025, 10:04 PM
Workflow Actions
Edit
Immediate Workflow Actions
Type
Description
Email Alert
fee_remainder_alert_to_student
Time-Dependent Workflow Actions
See an example
You cannot add time-dependent workflow actions because your evaluation criteria is "Every time a record is created or edited". Change Evaluation Criteria

3 .ProcessBuilder

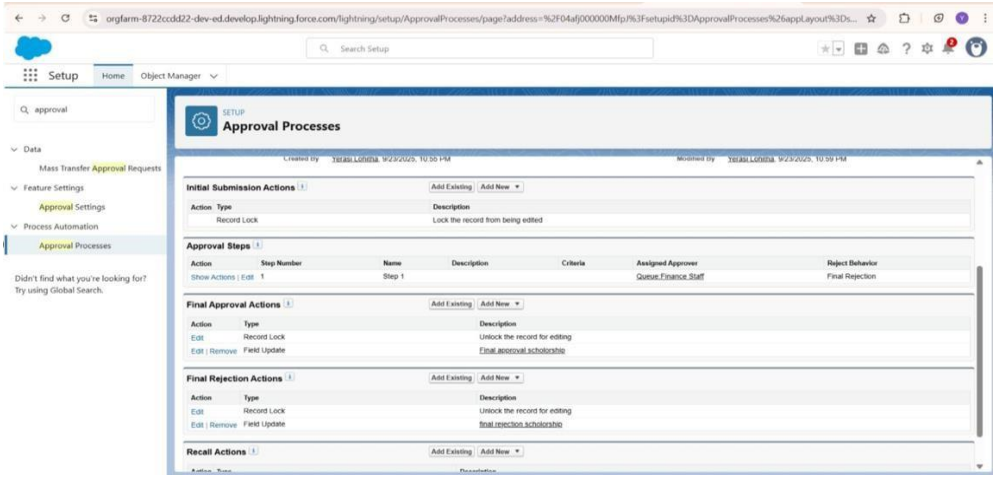
Object: Student__c

- **Process Name:** Graduation Update
- **Criteria:** When Status__c = "Graduated"
- **Action 1:** Update Field → Graduation_Date__c = TODAY()
- **Action 2:** Send Email Alert → "Graduation Congratulations Email" to student.



Object: Student__c

- **Process Name:** Scholarship Approval
- **Entry Criteria:** Scholarship_Requested__c = TRUE
- **Steps:**
    1. Initial Submission → Lock record.
    2. Assigned To → Finance Staff Queue.
    3. Final Approval → Unlock record + Update Scholarship_Status__c = "Approved".
    4. Rejection → Update Scholarship_Status__c = "Rejected".



5. Flow Builder

a) Screen Flow: Student Registration

- **Inputs:** First Name, Last Name, Email, Enrollment Year, Status.

- **Action:** Create Student record in Student__c.

b) Record-Triggered Flow: Auto Assign Status

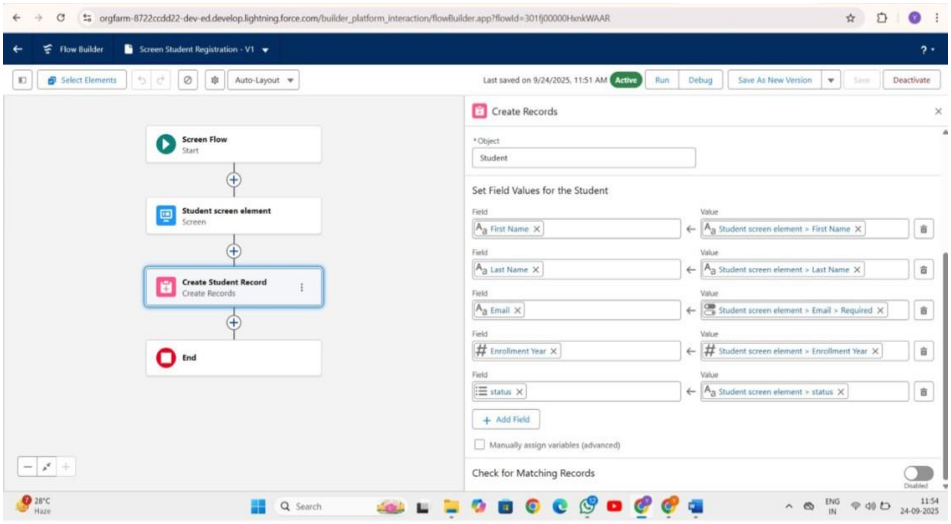
- **When:** A new Student record is created.
- **Condition:** If Enrollment_Year__c = T(YEAR(TODAY()))
- **Action:** Update Status__c = "Enrolled".

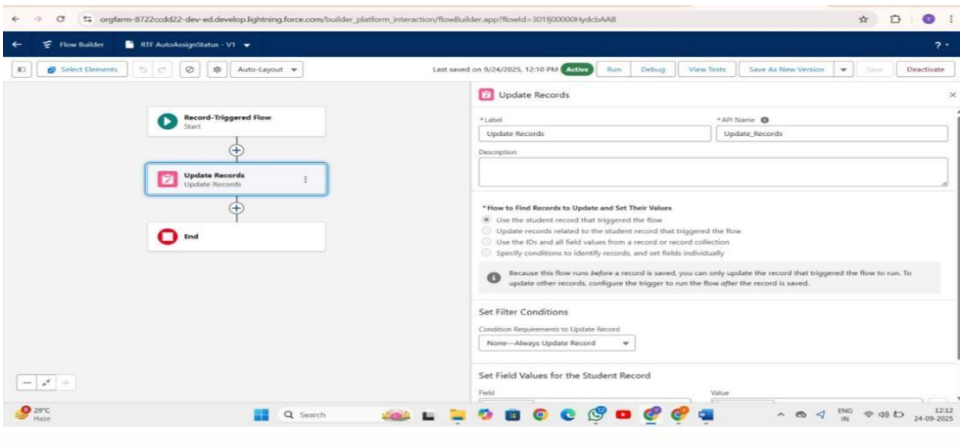
c) Scheduled Flow: Semester Reminder

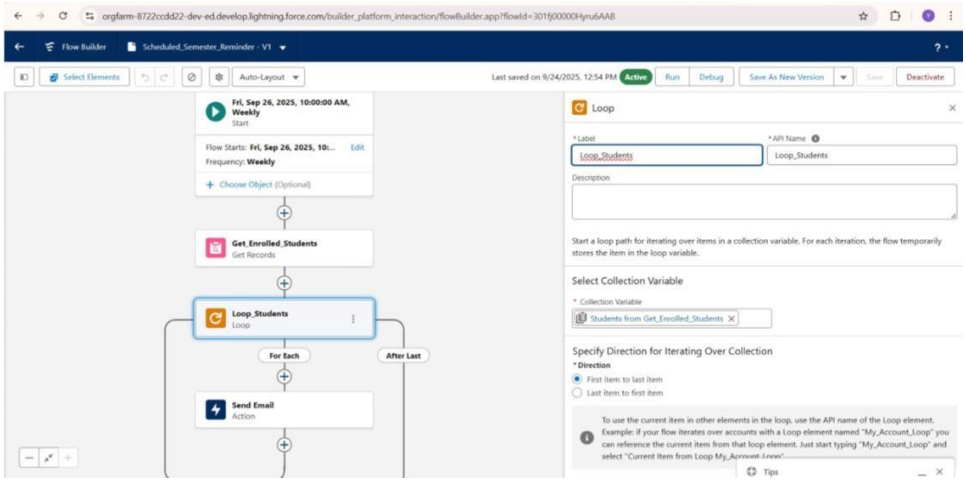
- **When:** Every semester start date (Scheduled path).
- **Action:** Send Email Alert to all Student__c records with Status__c = "Enrolled".

d) Auto-Launched Flow: Calculate Student Age

- **Formula:** TODAY() - Date_of_Birth__c
- **Action:** Update Age__c field in Student__c.



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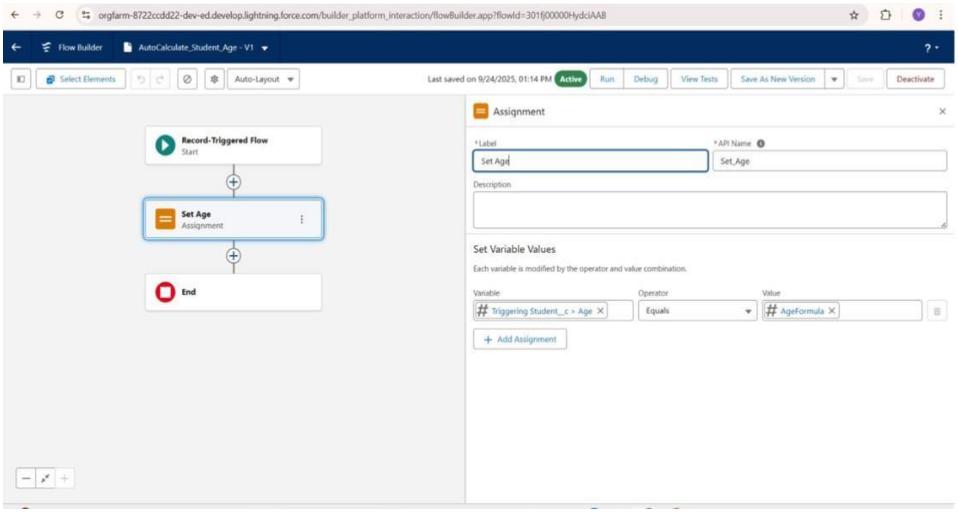
Flow Builder
Scheduled_Semester_Reminder - V1
Select Elements
Auto-Layout
Last saved on 9/24/2025, 12:54 PM
Active
Run
Debug
Save As New Version
Save
Deactivate
Fri, Sep 26, 2025, 10:00:00 AM, Weekly
Start
Flow Starts: Fri, Sep 26, 2025, 10:...
Edit
Frequency: Weekly
Choose Object (Optional)
Get_Enrolled_Students
Get Records
Loop_Students
Loop
For Each
After Last
Send Email
Action
Loop
* Label
Loop_Students
* API Name
Loop_Students
Description
Start a loop path for iterating over items in a collection variable. For each iteration, the flow temporarily stores the item in the loop variable.
Select Collection Variable
* Collection Variable
Students from Get_Enrolled_Students
Specify Direction for Iterating Over Collection
* Direction
First item to last item
Last item to first item
To use the current item in other elements in the loop, use the API name of the Loop element. Example: if your flow iterates over accounts with a Loop element named "My_Account_Loop" you can reference the current item from that loop element. Just start typing "My_Account_Loop" and select "Current Item from Loop My_Account_Loop"
Tips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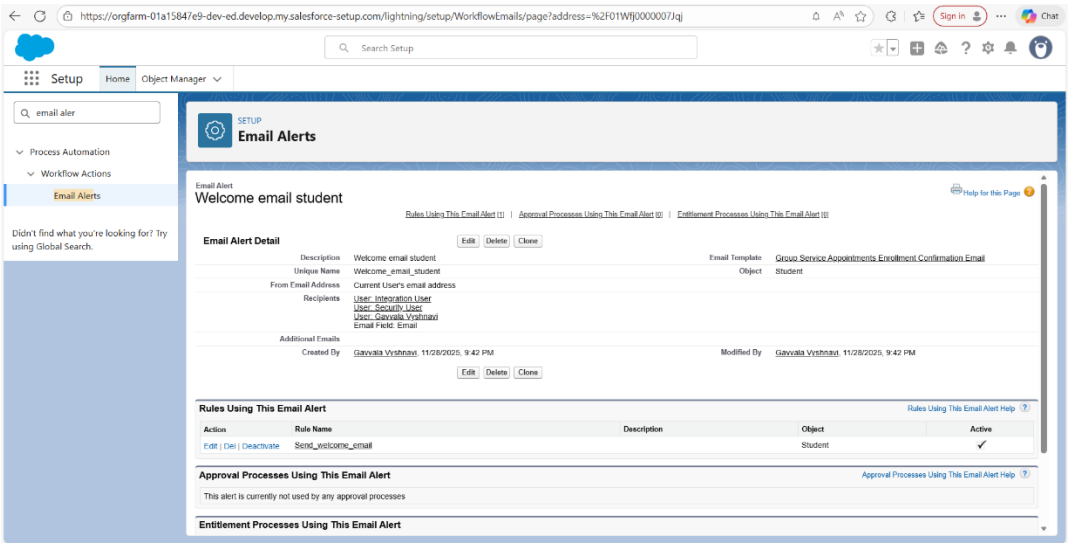
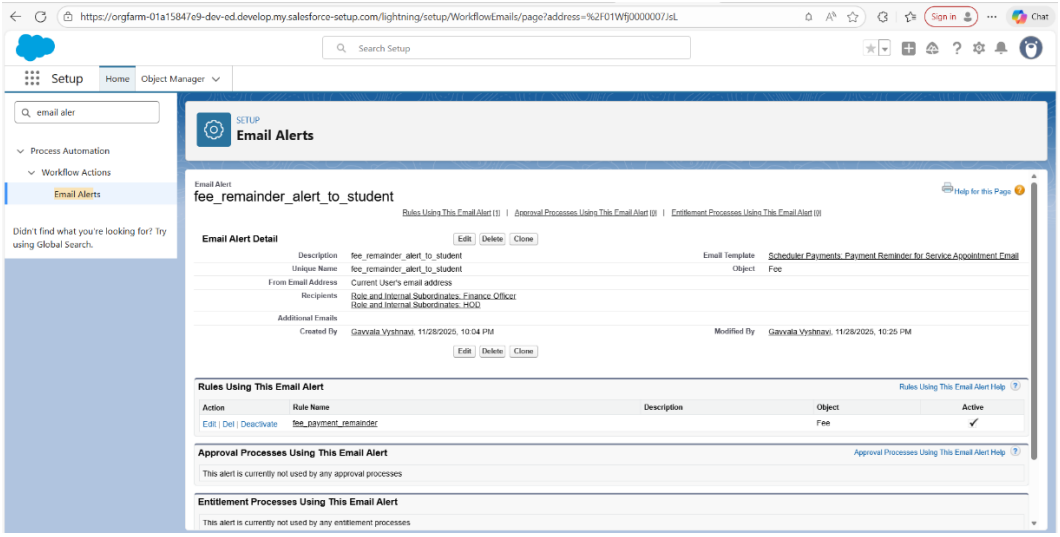
Flow Builder
AutoCalculate_Student_Age - V1
Select Elements
Auto-Layout
Last saved on 9/24/2025, 01:14 PM
Active
Run
Debug
View Tests
Save As New Version
Save
Deactivate
Record-Triggered Flow
Start
Set Age
Assignment
End
Assignment
* Label
Set Age
* API Name
Set_Age
Description
Set Variable Values
Each variable is modified by the operator and value combination.
Variable
Operator
Value
Triggering Student__c > Age
Equals
AgeFormula
Add Assignment

6. Email Alerts

Object: Student__c

- **Templates Created:**
- Welcome Student Email (after registration).
- Fee remainder For Students.





7. Field Updates

Objects & Fields:

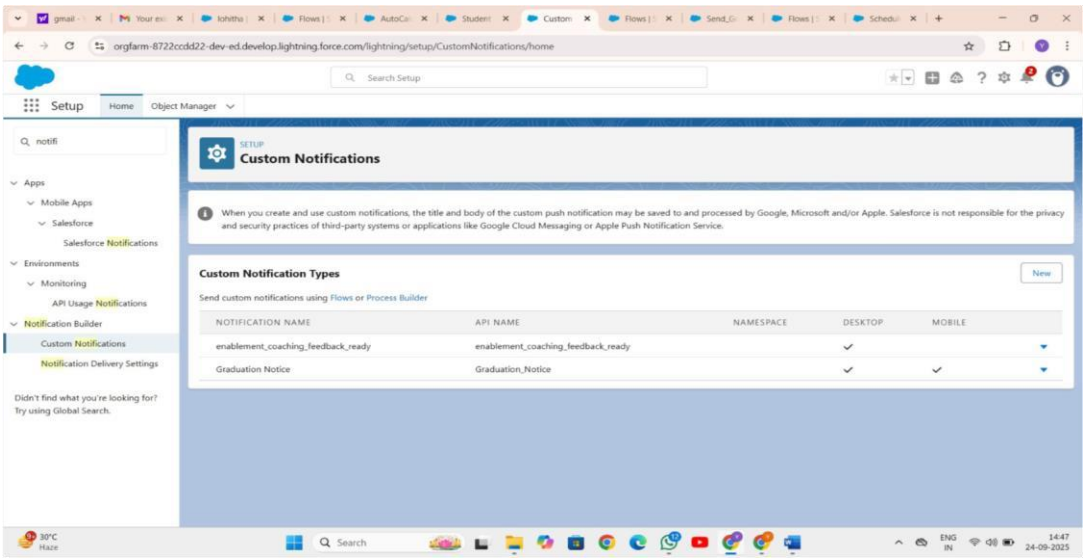
- Student__c.Status__c → "Inactive" (Workflow Rule).
- Student__c.Graduation_Date__c → TODAY() (Process Builder).
- Student__c.Age__c → Formula result (Flow).

8. Tasks

Object: Student__c

- **Example:** Checks whether a student is having low CGPA than the standard eligibility CGPA.

9. Custom Notifications

Object: Student__c

- **Example:** When a student is marked as “Graduated”, send a **Custom Notification** to the Advisor/Staff to initiate alumni registration.