# 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.

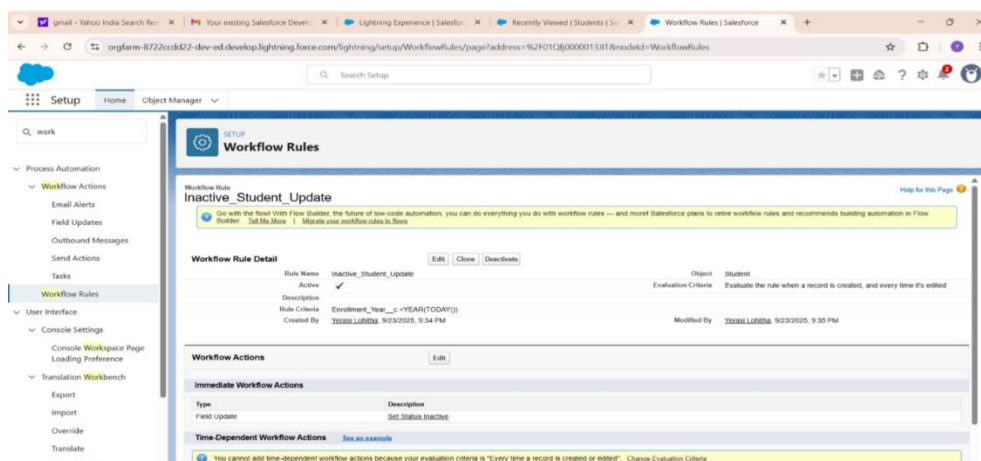## 1. Validation Rules

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."
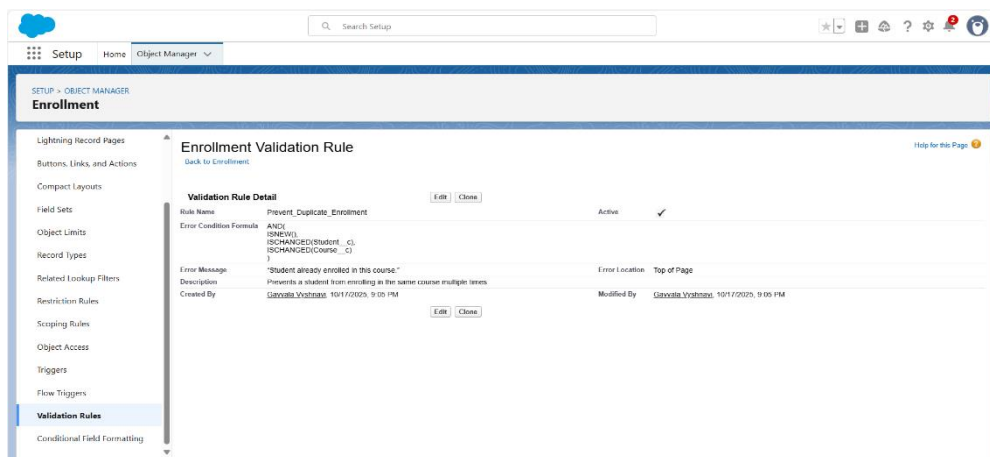
2. Workflow Rules

Object: Student__c

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

orgfarm-8722ccdd22-dev-ed.develop.lightning.force.com/lightning/setup/WorkflowRules/page?address=%2F01Q0J0000013JJQ8&nodeId=WorkflowRules

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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
Description			
Rule Criteria	TRUE		
Created By	Yerasi Lohitha, 9/23/2025, 9:43 PM	Modified By	Yerasi Lohitha, 9/23/2025, 9:45 PM

Workflow Actions   Edit

Immediate Workflow Actions

| Type | Description |
| Email Alert | Welcome email to student |

Workflow Rule: Send_Welcome_Email – Salesforce - Developer Edition

Time-Dependent Workflow Actions   See an example

⚠ You cannot add new time triggers on an active rule. Deactivate This Rule

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    Translation Language

SETUP
Workflow Rules

Workflow Rule
Low_GPA_Task   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	Low_GPA_Task	Object	Student
Active	✓	Evaluation Criteria	Evaluate the rule when a record is created, and every time it's edited
Description			
Rule Criteria	GPA__c<5		
Created By	Yerasi Lohitha, 9/23/2025, 10:16 PM	Modified By	Yerasi Lohitha, 9/23/2025, 10:19 PM

Workflow Rule: Low_GPA_Task – Salesforce - Developer Edition

Workflow Actions   Edit

Immediate Workflow Actions

| Type | Description |
| Task | Review Low GPA 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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orgfarm-8722ccdd22-dev-ed.develop.lightning.force.com/lightning/setup/WorkflowRules/page?address=%2F01Q0J0000013Jn7&nodeId=WorkflowRules

Search Setup

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SETUP
Workflow Rules

Fee_Payment_Reminder

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	Fee_Payment_Reminder	Object	Fee
Active	✓	Evaluation Criteria	Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria
Description			
Rule Criteria	ISPICKVAL(Payment_status__c, "Pending")		
Created By	Yerasi Lohitha, 9/23/2025, 10:24 PM	Modified By	Yerasi Lohitha, 9/23/2025, 10:32 PM

Workflow Actions   Edit

Immediate Workflow Actions

No workflow actions have been added.

Time-Dependent Workflow Actions   See an example
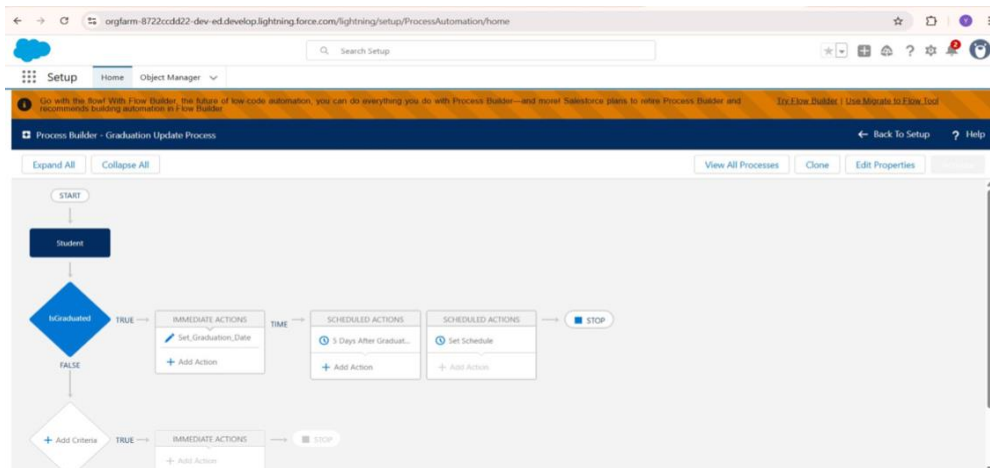
📅 7 Days After Rule Trigger Date

| Type | Description |
| Email Alert | Fee reminder email for students |

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".
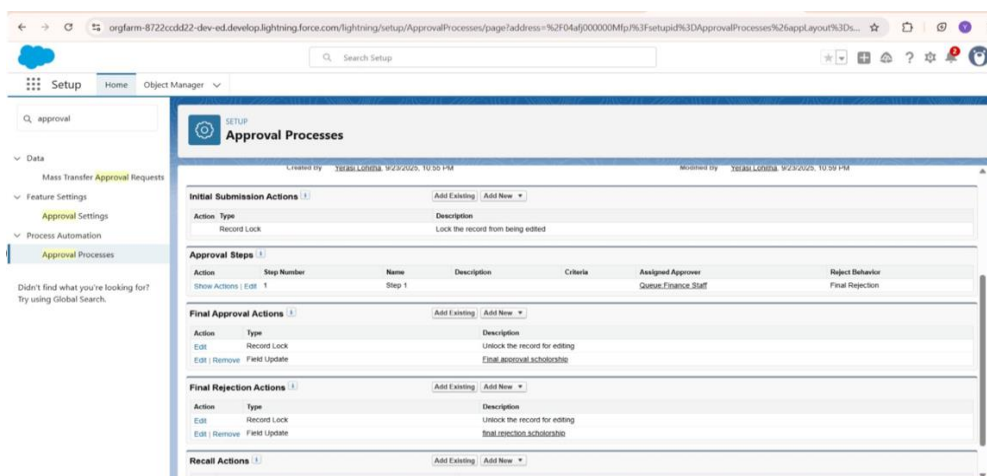
5. Flow Builder

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 = TEXT(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.

6. Email Alerts

Object: Student__c

☐ **Templates Created:**

- Welcome Student Email (after registration).

- Semester Reminder Email.
  3. GraduationCongratulationsEmail.

Email Alert — Semester Reminder Alert

Email Alert Detail

Edit | Delete | Clone

Description	Semester Reminder Alert
Unique Name	Semester_Reminder_Alert
From Email Address	Current User's email address
Recipients	Role: Principle Role: HOD Role: Teachers Email Field: Email
Additional Emails	
Created By	Yerasi Lohitha, 9/24/2025, 12:14 AM

Email Template	Semester_Reminder
Object	Student
Modified By	Yerasi Lohitha, 9/24/2025, 12:14 AM

Edit | Delete | Clone

Rules Using This Email Alert

This alert is currently not used by any rules

Email Alert : Semester Reminder Alert ~ Salesforce - Developer Edition

Approval Processes Using This Email Alert

This alert is currently not used by any approval processes

Entitlement Processes Using This Email Alert

Email Alert — Fee reminder email for students

Email Alert Detail

Edit | Delete | Clone

Description	Fee reminder email for students
Unique Name	Fee_reminder_for_students
From Email Address	Current User's email address
Recipients	User: Finance users User: HOD users
Additional Emails	
Created By	Yerasi Lohitha, 9/23/2025, 10:32 PM

Email Template	Fee Reminder Email
Object	Fee
Modified By	Yerasi Lohitha, 9/23/2025, 10:32 PM

Edit | Delete | Clone

Rules Using This Email Alert

Email Alert : Fee reminder email for students ~ Salesforce - Developer Edition

| Action	Rule Name	Description	Object	Active
Edit	Deactivate	Fee_Payment_Reminder		Fee	✓

Approval Processes Using This Email Alert

This alert is currently not used by any approval processes

Entitlement Processes Using This Email Alert

6. Email Alerts

Object: Student__c

- **Templates Created:**
- Welcome Student Email (after registration).
- Semester Reminder Email.
- Fee remainder For Students.
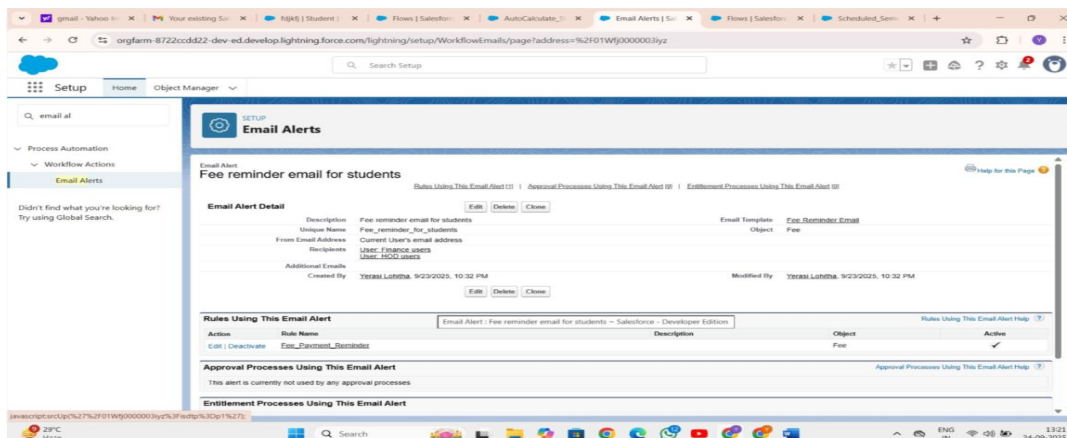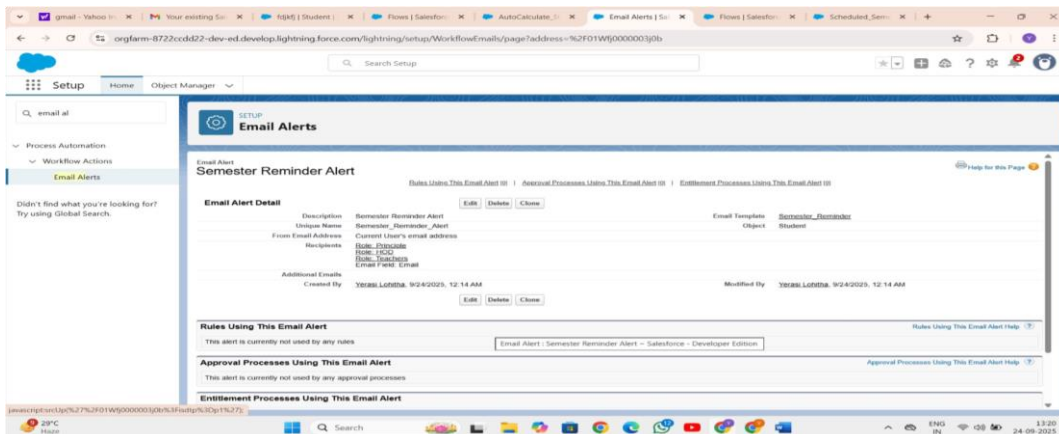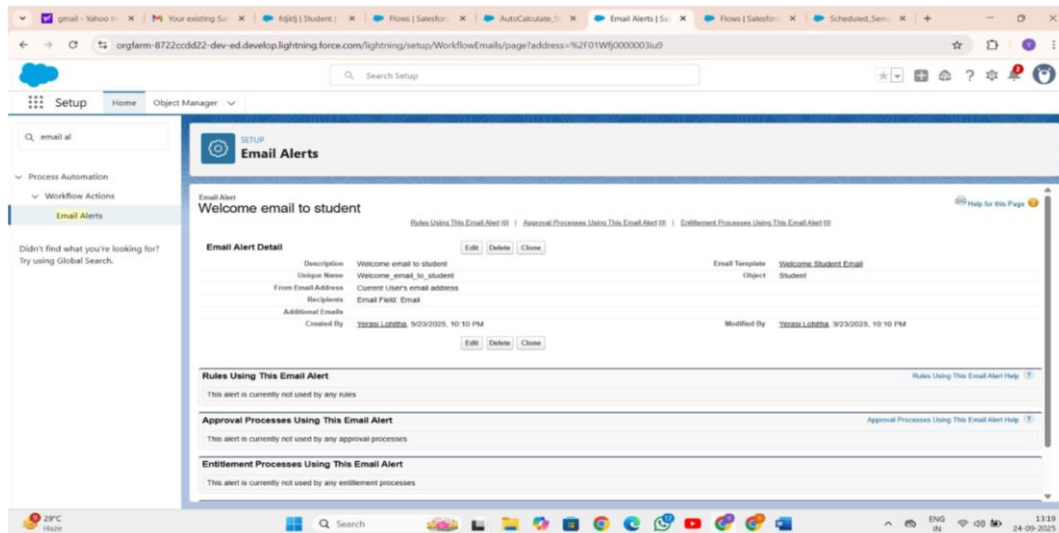
7. Field Updates

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.