Phase 4: Process Automation (Admin)
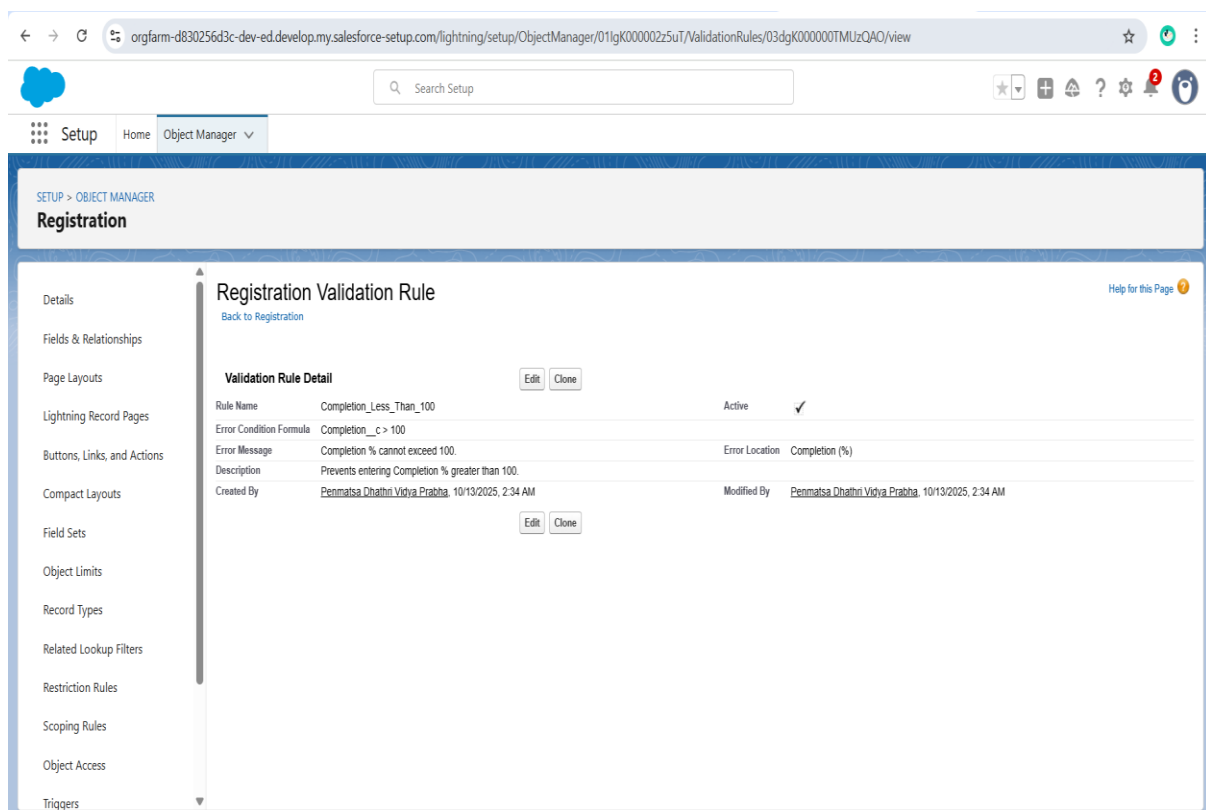
1. Validation Rules

Email format check:

- **Object:** Employee

- **Rule Name**: Email_format_check

- **Description:** Ensures the employee email contains @ and a domain (valid email format).

- **Formula**: NOT(REGEX(Email__c, "^[A-Za-z0-9._%+-]+@[A-Za-z0-9.-]+\\.[A-Za-z]{2,}$"))

- **Error Message:** Please enter a valid email address.

- **Error Location:** Field → select Email field**.**

- **Active:** Yes (Make sure the rule is active)

- **Trigger:** Applies on record creation and edit.

Completion Less Than 100:

- **Object**: Registration

- **Rule Name:** Completion_Less_Than_100

- **Description:** Prevents entering Completion % greater than 100.

- **Formula:** Completion__c > 100

- **Error Message:** Completion % cannot exceed 100.

- **Error Location:** Field → select Completion % field.

- **Active:** Yes

- **Trigger:** Applies on record creation and edit.

2. Flow Builder

Implementation Details

- **Flow Type**: Record-Triggered Flow

- **Object:** Registration

- **Trigger:** When a record is created or updated

- **Condition:** [Registration].Completion__c == 100

- **Flow Actions:** Update Records → Set field Status__c = "Completed"

- **Optimization:** Action and Related Records (since it updates the same record)

- **Activate:** Yes (make sure the flow is active)

- **Error Handling:** Flow will only trigger when Completion % equals 100 — it won't run for lower percentages.

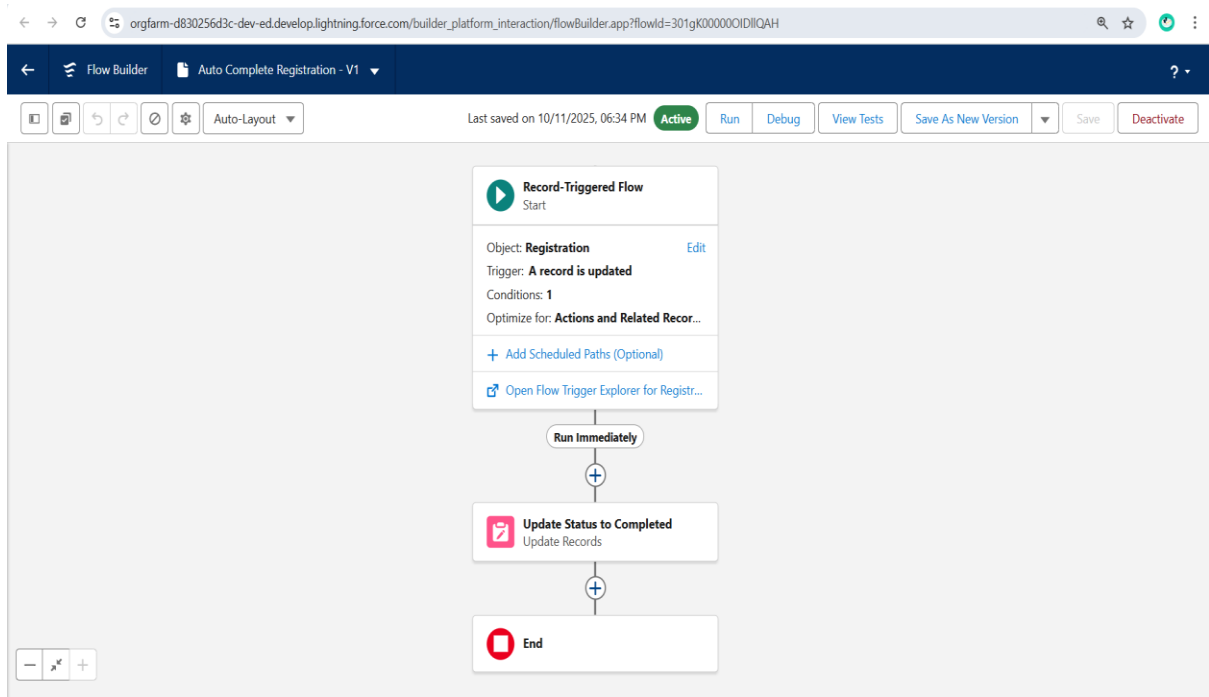**Flow Elements Used**

1. **Start Element:**

   - **Trigger:** A record is created or updated

   - **Condition:** Completion__c Equals 100

2. **Update Records Element:**

   - **Action:** Update the same Registration record

   - **Field Updated:** Status__c

   - **New Value:** Completed

3. **End Element:**

   - Confirms the flow has completed its update action.

3. Process Builder

Implementation Details

- **Object:** Registration
- **Trigger:** When a record is created or edited

Criteria:

- **Condition:** [Registration].Status__c = 'In Progress'
- **Execution:** When conditions are met

Field	Type	Value / Formula
Assigned To ID	Field Reference	[Registration].Employee__c
Priority	Picklist	Normal
Status	Picklist	Not Started

Search Setup

Setup   Home   Object Manager ∨

Process Builder - Assign Task for In Progress Training   ← Back To Setup   ? Help

Expand All   Collapse All   View All Processes   Clone   View Properties   Deactivate   Read Only ⓘ

START

Registration

Status=In Progress   TRUE →   IMMEDIATE ACTIONS   →   ■ STOP
                                  ▦ Complete the Task
                                  + Add Action

FALSE

+ Add Criteria   TRUE →   IMMEDIATE ACTIONS   →   ■ STOP
                            + Add Action

Create a Record   ❓

Action Name * ⓘ
Complete the Task

Record Type *
Task

Set Field Values

Field *	Type *	Value *
Assigned To ID	Field Reference ▾	[Registration__c].Employ... 🔍
Priority	Picklist ▾	Normal ▾
Status	Picklist ▾	Not Started ▾

Save   Cancel