

Phase 4 Documentation – Process Automation

Goal

To make **CampusConnect – Student Attendance & Engagement Hub** fully functional with automation.

Phase 4 focuses on **validations, workflows, flows, and email alerts** to automate attendance tracking, student status updates, and event management.

Deployment Summary

- **Status:** Succeeded
- **Components Deployed:** 99/99 (100%)
- **Deploy ID:** 0AfgL00000AUHk1SAH
- **Target Org:** gaurigarole19559@agentforce.com


Succeeded			
Action	Name	Status	Date
View Details	0AfgL00000AUWvx	✓ Deploy: Succeeded	9/21/2025, 1:21 PM
View Details	0AfgL00000AUGJM	✓ Deploy: Succeeded	9/21/2025, 12:36 PM
View Details	0AfgL00000AU8C8	✓ Deploy: Succeeded	9/21/2025, 11:58 AM
View Details	0AfgL00000AUHk1	✓ Deploy: Succeeded	9/21/2025, 11:13 AM
View Details	0AfgL00000ATYdF	✓ Deploy: Succeeded	9/21/2025, 5:18 AM
View Details	0AfgL00000ABSsu	✓ Deploy: Succeeded	9/15/2025, 10:35 PM
View Details	0AfgL00000ABaiL	✓ Deploy: Succeeded	9/15/2025, 10:10 PM
View Details	0AfgL000009Bieu	✓ Deploy: Succeeded	8/28/2025, 11:28 AM

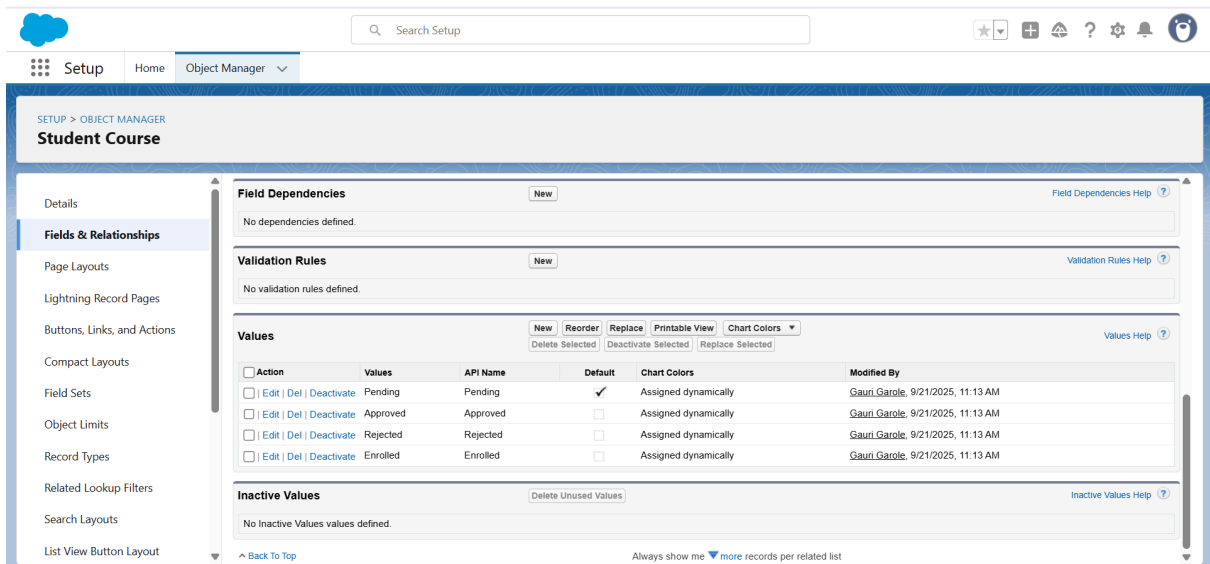
Previous (1 - 8 of 8) Next

New Phase 4 Components

1. New Fields for Automation

- ✓ **Student__c.Status__c** → Values: Regular, At Risk, Probation
- ✓ **Event__c.Status__c** → Values: Scheduled, In Progress, Completed, Cancelled
- ✓ **Event__c.End_Date__c** → DateTime field

-  **StudentCourse__c.Enrollment_Status__c** → Values: Pending, Approved, Rejected, Enrolled



SETUP > OBJECT MANAGER

Student Course

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

Field Dependencies [New](#) [Field Dependencies Help](#)

No dependencies defined.

Validation Rules [New](#) [Validation Rules Help](#)

No validation rules defined.

Values [New](#) [Reorder](#) [Replace](#) [Printable View](#) [Chart Colors](#) [Values Help](#)

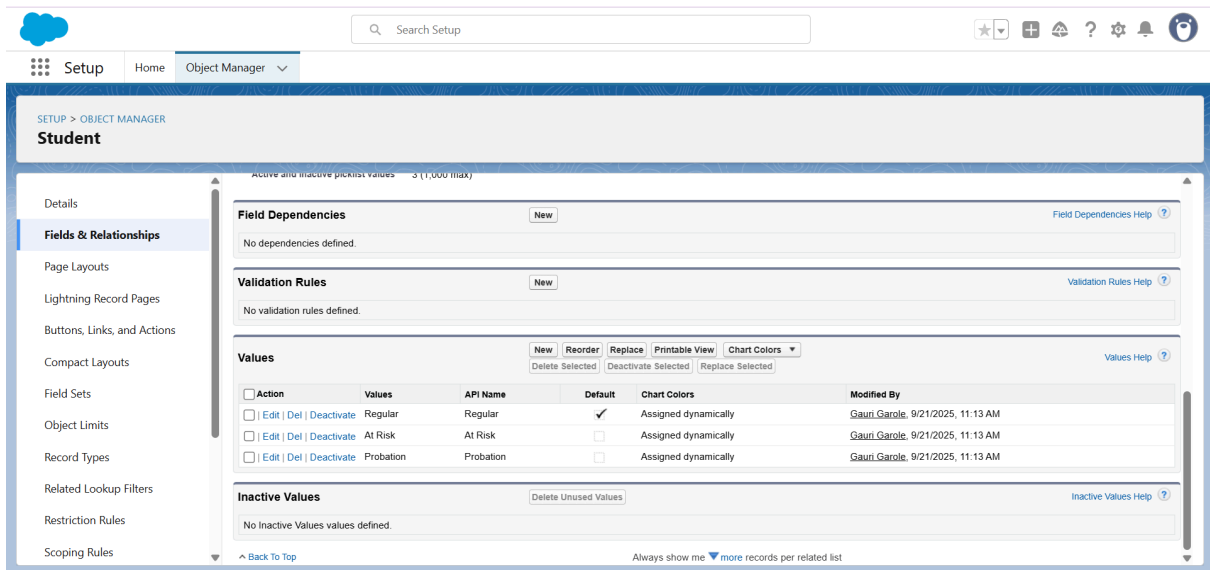
[Delete Selected](#) [Deactivate Selected](#) [Replace Selected](#)

Action	Values	API Name	Default	Chart Colors	Modified By
Edit Del Deactivate	Pending	Pending	<input checked="" type="checkbox"/>	Assigned dynamically	Gauri Garole, 9/21/2025, 11:13 AM
Edit Del Deactivate	Approved	Approved	<input type="checkbox"/>	Assigned dynamically	Gauri Garole, 9/21/2025, 11:13 AM
Edit Del Deactivate	Rejected	Rejected	<input type="checkbox"/>	Assigned dynamically	Gauri Garole, 9/21/2025, 11:13 AM
Edit Del Deactivate	Enrolled	Enrolled	<input type="checkbox"/>	Assigned dynamically	Gauri Garole, 9/21/2025, 11:13 AM

Inactive Values [Delete Unused Values](#) [Inactive Values Help](#)

No Inactive Values values defined.

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SETUP > OBJECT MANAGER

Student

Active and inactive picklist values: 3 (1,000 Max)

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Field Dependencies [New](#) [Field Dependencies Help](#)

No dependencies defined.

Validation Rules [New](#) [Validation Rules Help](#)

No validation rules defined.

Values [New](#) [Reorder](#) [Replace](#) [Printable View](#) [Chart Colors](#) [Values Help](#)

[Delete Selected](#) [Deactivate Selected](#) [Replace Selected](#)

Action	Values	API Name	Default	Chart Colors	Modified By
Edit Del Deactivate	Regular	Regular	<input checked="" type="checkbox"/>	Assigned dynamically	Gauri Garole, 9/21/2025, 11:13 AM
Edit Del Deactivate	At Risk	At Risk	<input type="checkbox"/>	Assigned dynamically	Gauri Garole, 9/21/2025, 11:13 AM
Edit Del Deactivate	Probation	Probation	<input type="checkbox"/>	Assigned dynamically	Gauri Garole, 9/21/2025, 11:13 AM



Inactive Values [Delete Unused Values](#) [Inactive Values Help](#)

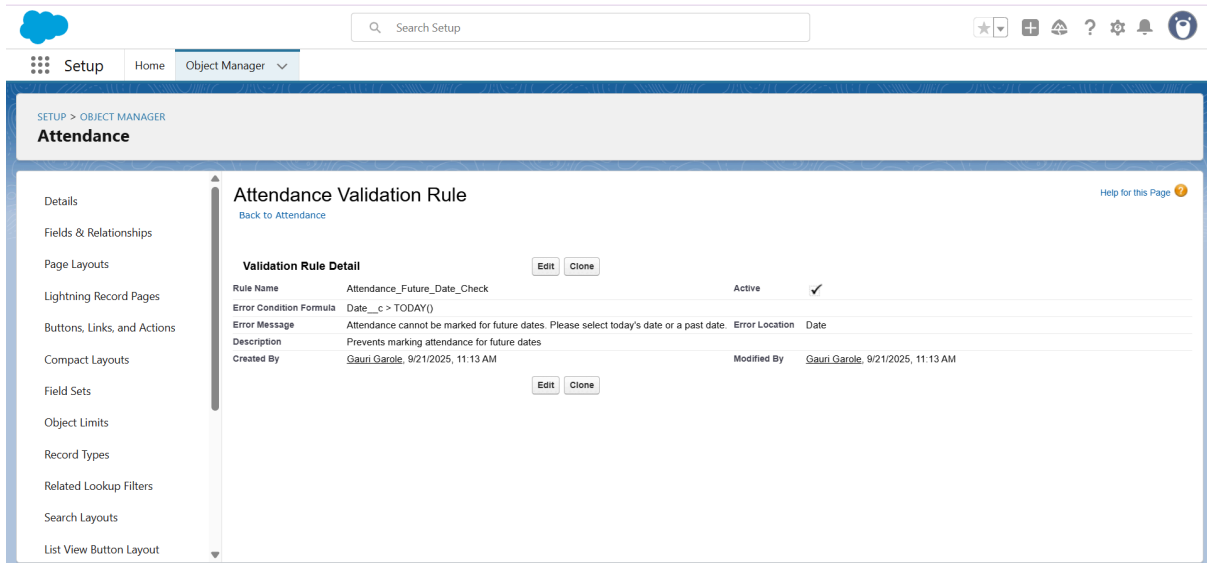
No Inactive Values values defined.

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2. Validation Rules

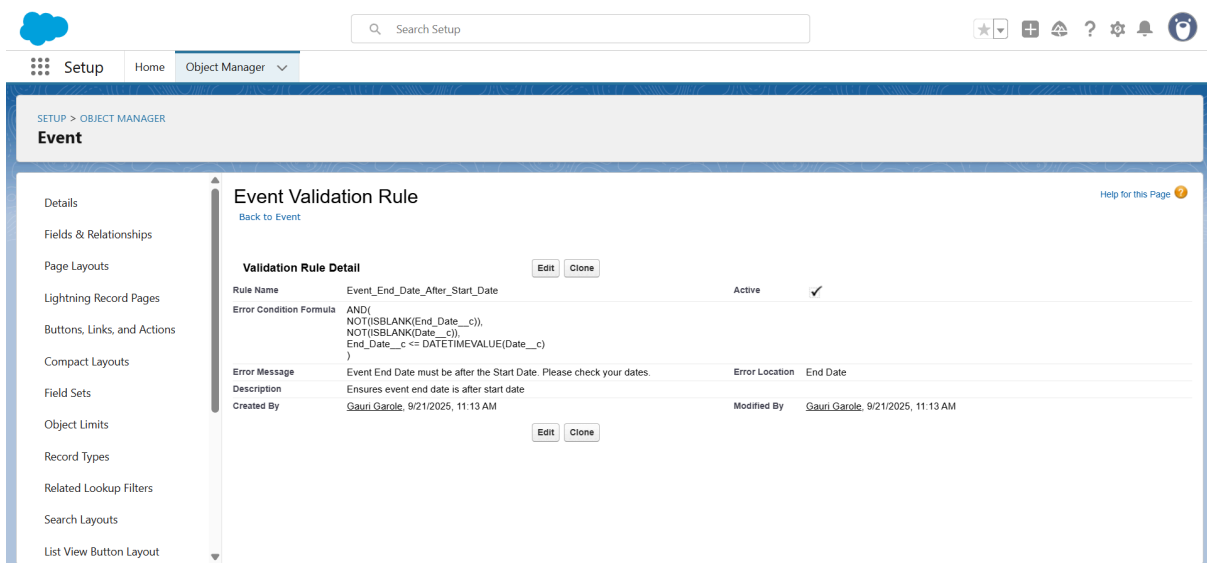
-  **Attendance_Future_Date_Check** → Prevents future date attendance

-  **Attendance_Status_Required** → Ensures status is always selected
-  **Event_End_Date_After_Start_Date** → Validates event date logic



The screenshot shows the Salesforce Setup interface for the 'Attendance' object. 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, and List View Button Layout. The main content area is titled 'Attendance Validation Rule' and includes a 'Back to Attendance' link. Below this is a 'Validation Rule Detail' section with 'Edit' and 'Clone' buttons. The rule details are as follows:



Field	Value	Field	Value
Rule Name	Attendance_Future_Date_Check	Active	<input checked="" type="checkbox"/>
Error Condition Formula	Date__c > TODAY()		
Error Message	Attendance cannot be marked for future dates. Please select today's date or a past date.		
Error Location	Date		
Description	Prevents marking attendance for future dates		
Created By	Gauri Garole, 9/21/2025, 11:13 AM	Modified By	Gauri Garole, 9/21/2025, 11:13 AM

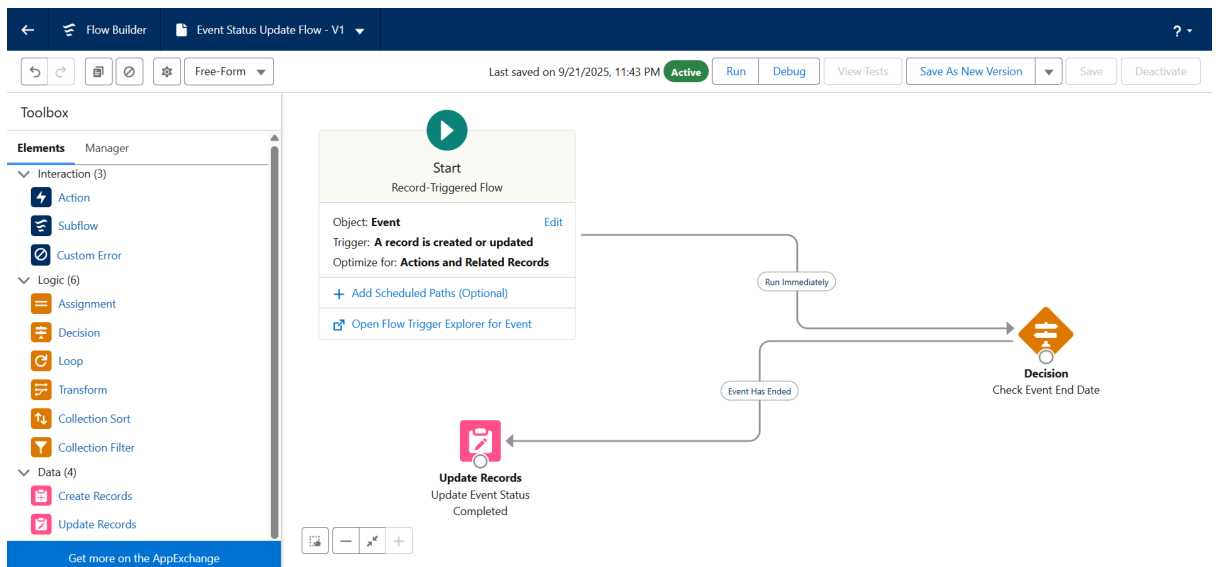
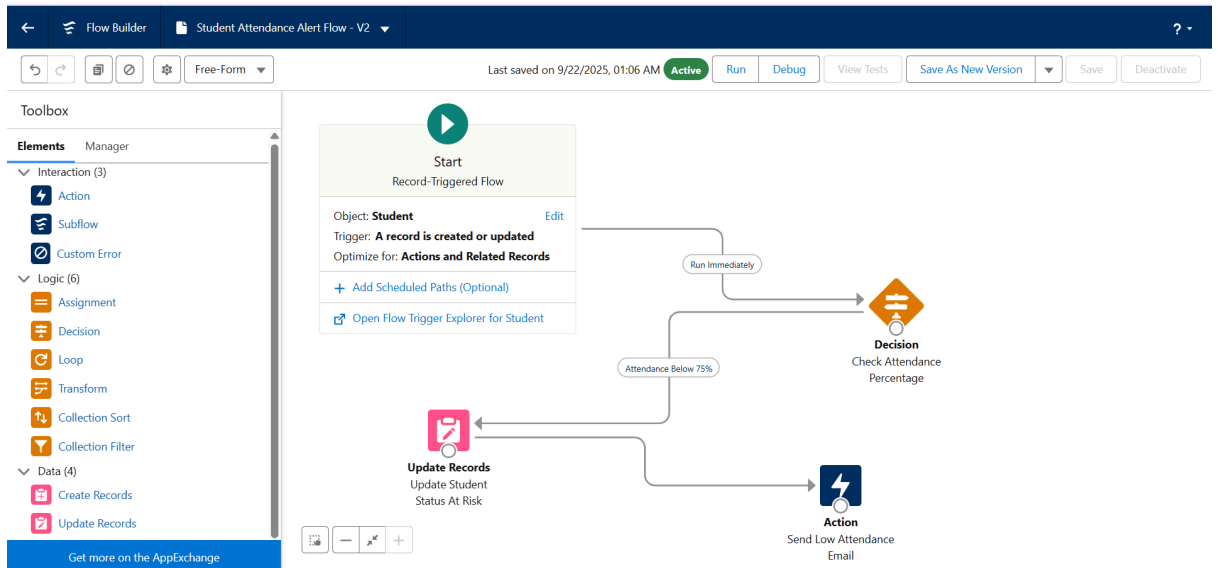


The screenshot shows the Salesforce Setup interface for the 'Event' object. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View Button Layout. The main content area is titled 'Event Validation Rule' and includes a 'Back to Event' link. Below this is a 'Validation Rule Detail' section with 'Edit' and 'Clone' buttons. The rule details are as follows:

Field	Value	Field	Value
Rule Name	Event_End_Date_After_Start_Date	Active	<input checked="" type="checkbox"/>
Error Condition Formula	AND(NOT(ISBLANK(End_Date__c)), NOT(ISBLANK(Date__c)), End_Date__c <= DATETIMEVALUE(Date__c))		
Error Message	Event End Date must be after the Start Date. Please check your dates.		
Error Location	End Date		
Description	Ensures event end date is after start date		
Created By	Gauri Garole, 9/21/2025, 11:13 AM	Modified By	Gauri Garole, 9/21/2025, 11:13 AM

3. Process Automation (Flows)

-  **Student_Attendance_Alert_Flow** → Monitors **Attendance_Percentage__c < 75**
-  **Event_Status_Update_Flow** → Auto-updates event status when End Date passes



4. Email Templates & Alerts

- ☒ **CampusConnect_Templates** folder created
- ☒ **Low_Attendance_Alert** email template created

- ☒ Workflow rules configured to trigger alerts

5. Workflow Automation

- ☒ **Low_Attendance_Alert_Rule** → Triggers when attendance < 75%
- ☒ **Update_Student_Status_At_Risk** → Auto-updates student status
- ☒ **Low_Attendance_Student_Alert** → Sends email notifications

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with "Workflow Rules" entered. The main content area is titled "Workflow Rules" and displays the configuration for the "Low_Attendance_Alert_Rule".

Workflow Rule Detail

Rule Name	Low_Attendance_Alert_Rule	Object	Student
Active	<input checked="" type="checkbox"/>	Evaluation Criteria	Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria
Description	Triggers alerts and status updates for students with low attendance		
Rule Criteria	Student: Attendance % LESS THAN 75		
Created By	Gauri Garole, 9/21/2025, 11:13 AM	Modified By	Gauri Garole, 9/21/2025, 11:13 AM

Workflow Actions

Immediate Workflow Actions

Type	Description
Email Alert	Alert sent to students when attendance falls below 75%
Field Update	Update Student Status At Risk

Testing

Test Case 1 – Attendance Above 75%

- Student record updated with **Attendance % = 80**
- ☒ Status remains **Regular**
- ☒ No email alert triggered

The screenshot shows the CampusConnect interface. At the top, there's a navigation bar with 'CampusConnect' and various menu items like 'Students', 'Attendance Records', 'Faculties', 'Courses', 'Events', 'Lectures', and 'Student Courses'. A search bar is also present. Below the navigation bar, the main content area displays a student profile for 'gaury-demo'. The profile includes fields for 'Roll No' (22), 'Attendance %' (75%), and 'Student Email' (gaurygarole19@gmail.com). There are buttons for 'New Contact', 'Edit', and 'New Opportunity'. On the right, there's an 'Activity' section with filters and a list of activities. The bottom of the screen shows a taskbar with various application icons and a system clock indicating 11:42 AM.

Test Case 2 – Attendance Below 75%

- Student record updated with **Attendance % = 60**
- ☒ Status auto-updated to **At Risk**
- ☒ Email alert sent to Student + Admin

The screenshot shows an email alert from CampusConnect. The subject line is 'CampusConnect: Attendance Alert - Action Required'. The email is addressed to 'Gauri Garole' and is dated '10:24 (1 hour ago)'. The body of the email states: 'Dear Student, Your current attendance percentage is below the required 75% threshold. Your status has been updated to At Risk. Please contact your faculty advisor for assistance. Best regards, CampusConnect Administration Team'. At the bottom, there are buttons for 'Reply', 'Forward', and a smiley face icon. The email is displayed in a standard email client interface with a sidebar on the right showing various icons and a search bar.

Outcome

- Automated **status updates** based on attendance percentage.
- Automated **event status tracking** (Scheduled → Completed).
- Real-time **email alerts** sent when students fall below attendance thresholds.
- End-to-end **automation of attendance, validation, and notifications**.