

Salesfoce Phase – 4

Student Internship Tracking & Recommendation System

Phase 4: Process Automation (Admin)

Validation Sets

❖ Validation Rule 1: Go to Setup.

- Click on the Object Manager.
- Find the required objects: Internship , Coding Languages
- ➤ Click on Validation Sets and click on New.
- Application:
- Purpose : Ensure students applying for a Technical Internship fill out the Coding Languages field
Rule Name: Require_Coding_Languages_For_Technical
Error Condition Formula : AND(ISPICKVAL(Internship_Type__c, "Technical"),
ISBLANK(Coding_Languages__c))
}
Error Message : Please enter Coding Languages for Technical Internship. **Error Location :** Field: Coding_Languages__c

Application Validation Rule Help for this Page 

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Validation Rule Detail	
Rule Name	Require_Coding_Languages_Technical
Error Condition Formula	AND(RecordType.DeveloperName = "Technical_Internship", ISBLANK(Coding_Languages__c))
Error Message	Please enter Coding Languages for Technical Internship.
Description	Make sure that students applying for a Technical Internship fill out the Coding Languages field.
Created By	Harshita Shrivastava, 9/23/2025, 12:52 PM
Edit Clone	

⊕ Validation Rule 2:

- **Purpose :** Prevent students from submitting an internship application with Status = "Applied" unless they have provided a resume.

Required Fields: Status , Resume

Rule Name: Require_Resume_When_Applied

Error Condition Formula : AND(ISNEW(),

ISPICKVAL(Status__c, "Applied"),

ISBLANK(Resume__c)

)

Error Message: Resume is required when applying for an internship.

Error Location: Field: Resume__c

Application Validation Rule

Back to Application Help for this Page

Validation Rule Detail

Rule Name	Require_Resume_On_Apply	Edit	Clone
Error Condition Formula	AND(ISNEW(), ISPICKVAL(Status__c, "Applied"), ISBLANK(Resume__c))	Active	✓
Error Message	Resume is required when applying for an internship.	Error Location	Top of Page
Description			
Created By	Harshita Shrivastava, 9/23/2025, 12:57 PM	Modified By	Harshita Shrivastava, 9/23/2025, 12:57 PM

Edit **Clone**

- † Workflow Rules:
- † Go to Setup.
- † In the Quick Find box, type the Workflow Rules and click on it.
- † Click continue.
- † Now click on the New Rule and click on Continue on the Workflow Rule.
- † † Select the objects: Student , Internship Application
- † † Click Next.
- † Internship Application:
 - Rule Name: Application_Status_Update
 - Evaluate Rule: created, and every time it's edited
 - Rule Criteria: Field: Status __c, Operator: =, Value: 'Submitted'
 - Click Save & Next and Done

SETUP Workflow Rules

Workflow Rule Send_Email_When_Selected Help for this Page

Workflow Rule Detail

Rule Name	Send_Email_When_Selected	Edit	Clone	Deactivate
Active	✓	Object	Application	
Description		Evaluation Criteria	Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria	
Rule Criteria	Application: Status EQUALS Selected	Created By	Harshita Shrivastava, 9/23/2025, 1:32 PM	
Created By	Harshita Shrivastava, 9/23/2025, 1:32 PM	Modified By	Harshita Shrivastava, 9/23/2025, 2:05 PM	

Workflow Actions

Immediate Workflow Actions

Type	Description
Email Alert	When an application's Status __c is changed to "Selected", an Email Alert should be sent to the student.

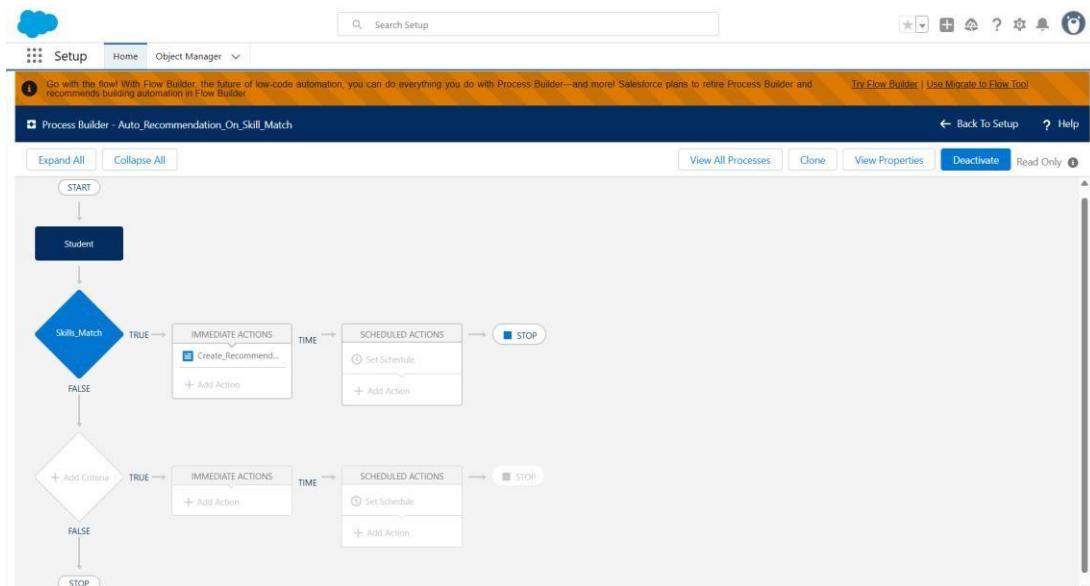
Time-Dependent Workflow Actions See an example

Warning You cannot add new time triggers to an active rule. Deactivate This Rule

Edit

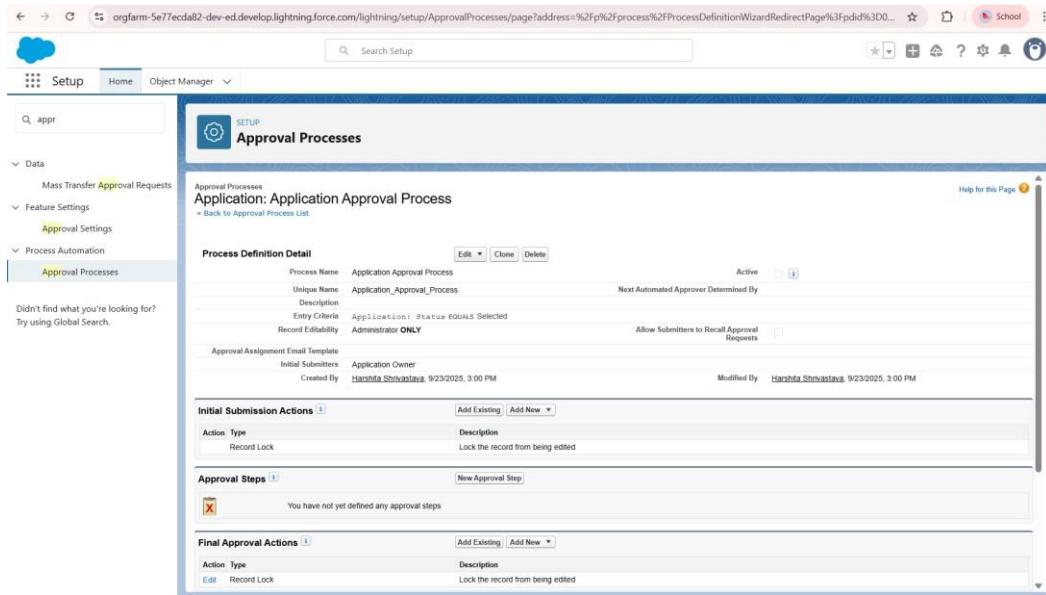
Process Builders:

- † Go to Setup.
- † In the Quick Find box, type the Process Builder and click on it.
- † Click on New.
- † Fill the details:
 - Process Name: Internship_Application_Process
 - API Name: Internship_Application_Process
 - The Process starts when: A record changes and then click save.
 - Click on +Add Object
 - Object: Internship Application
 - Start the Process: when a record is created or edited and then click save.
 - Click +Add Criteria
 - Name: Application_Submitted
 - Criteria: the field reference
 - Click +Add Action and Action Type: Email Alert
 - Action Name: Notify_Placement_Officer
 - Appointment Notification and click on save
 - Click Activate and then Confirm



□ Approval Process:

- Go to Setup.
- In the Quick Find box, type the Approval Settings and click on it.
- Select Applications.
- Select the Standard Wizard.



Flow Builder (Screen, Record-Triggered, Scheduled, Auto-launched):

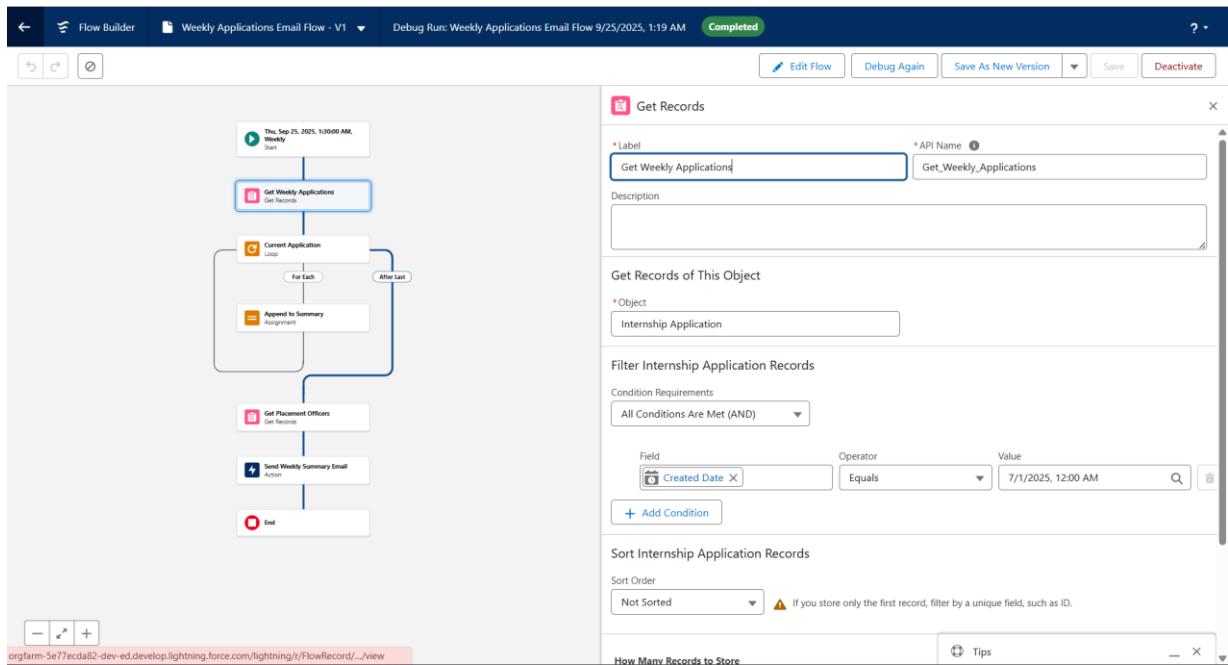
A. Scheduled Flow

◊ **Use Case:**

Automatically send a weekly summary of all internship applications to Placement Officers for easy tracking and review.

When it runs : Automatically on a schedule

1. **Setup → Flows → New Flow**
2. Select **Scheduled-Triggered Flow** → Click **Create**
3. **Set Schedule:**
 - Start Date & Time
 - **Repeat every Monday**
4. **Add "Get Records" element:**
 - Object: Internship_Application__c
 - Filter: Created_Date__c = "Open"
 - Store **all records**
5. **Add "Loop" element:**
 - Loop through the **Internship** records
6. **Inside loop:**
 - Logic to **send email** to students or **create tasks**
7. **Save & Activate**



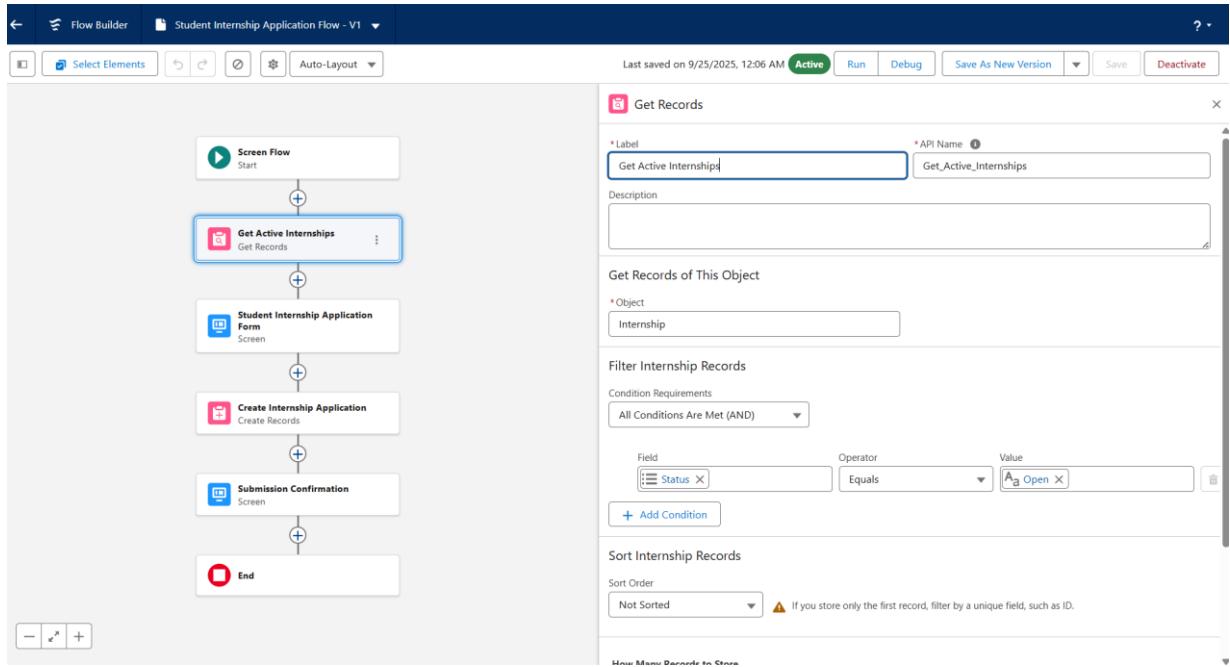
B. Screen Flow

Student Internship Application :

1. Get Active Internships
 - o Fetches all internships with Status = Active from the Internship object.
 - o Ensures students can only select available internships.
2. Student Application Screen
 - o Picklist: Internship (shows active internships fetched)
 - o Text Fields: First Name, Last Name
 - o Optional File Upload: Resume
 - o Collects all necessary information from the student.
3. Create Internship Application Record
 - o Saves the student's input as a new Internship Application record.
 - o Fields populated: First Name, Last Name, Internship (selected), Status = Submitted
 - o (Optional) Links uploaded resume to the record.
4. Confirmation Screen
 - o Displays a success message: "Your Internship Application has been submitted successfully!"
 - o Confirms to the student that their application is received.

Outcome:

- Streamlines internship application submission.
- Reduces manual entry for administrators.
- Ensures each application is correctly linked to the selected internship and student.



Email Alert

Go to Setup → Classic Email Templates → New Template

- Create templates for each alert type. Example:
 - Internship Application Submitted
 - Object: Internship_Application__c
 - Template Name: Internship_Application_Submitted
 - Recipients: Placement Officer, Admin
 - Application Status Updated
 - Object: Internship_Application__c
 - Template Name: Application_Status_Updated
 - Recipients: Student, Placement Officer

Create Email Alerts

- Go to Setup → Email Alerts → New Email Alert
- Select Object: Internship_Application__c
- Description: e.g., Internship Application Submission Alert
- Email Template: Select the template you created
- Recipients: Choose fields or users like Placement Officer, Student, or Admin

Link to Workflow or Process Builder

- For automatic sending, link the Email Alert to:
 - Workflow Rule (e.g., when Internship Application is created)
 - Process Builder (e.g., when Status changes to Approved/Rejected)

Email Alert: Internship Application Submitted

- **Description:** Alert sent when a student submits a new internship application.
- **Object:** Internship_Application__c
- **Email Template:** Internship_Application_Submitted
- **Recipients:** Placement Officer, Admin
- **Action Type:** Immediate Workflow Action

Email Alert: Application Status Updated

- **Description:** Alert sent when the status of an internship application is updated (e.g., Approved/Rejected).
- **Object:** Internship_Application__c
- **Email Template:** Application_Status_Updated
- **Recipients:** Student, Placement Officer
- **Action Type:** Immediate Workflow Action

All Email Alerts

[Help for this Page](#) 

Email alerts are used to send emails from a flow or other automation.

View: [All Email Alerts](#) [Create New View](#)

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New Email Alert				
Action	Description ↑	Email Template Name	Object	Last Modified Date
Edit Del	Application_Status_Updated	Application_Status_Updated	Internship Application	9/24/2025
Edit Del	Internship Application Submitted Alert	Internship_Application_Submitted	Internship Application	9/24/2025
Edit Del	When an application's Status__c is changed to "Selected", an Email Alert should be sent to the student.	Sales: New Customer Email	Application	9/23/2025

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Field Update

1. Internship Application – Submitted

- **Object:** Internship_Application__c
- **Rule Criteria:** When a new Internship Application record is created
- **Field Update Action:**
 - **Name:** Application_Status_Submitted
 - **Field to Update:** Status__c
 - **New Value:** Submitted

2. Internship Application – Approved

- **Object:** Internship_Application__c
- **Rule Criteria:** If Placement Officer marks **Decision = Approved**
- **Field Update Action:**
 - **Name:** Application_Status_Approved
 - **Field to Update:** Status__c
 - **New Value:** Approved

3. Internship Application – Rejected

- **Object:** Internship_Application__c
- **Rule Criteria:** If Placement Officer marks **Decision = Rejected**
- **Field Update Action:**
 - **Name:** Application_Status_Rejected
 - **Field to Update:** Status__c
 - **New Value:** Rejected

4. Internship Application – Completed

- **Object:** Internship_Application__c
- **Rule Criteria:** If Internship End Date < TODAY
- **Field Update Action:**
 - **Name:** Application_Status_Completed
 - **Field to Update:** Status__c
 - **New Value:** Completed

SETUP Workflow Rules

Workflow Rule **Notify_Placement_Officer_On_Application** 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 Delete Clone Activate

Rule Name	Notify_Placement_Officer_On_Application	Object	Internship Application
Active	<input type="checkbox"/>	Evaluation Criteria	Evaluate the rule when a record is created
Description			
Rule Criteria (Internship Application: Status EQUALS Approved) AND (Internship Application: Status EQUALS Rejected)			
Created By	Harshita Shrivastava, 9/24/2025, 2:22 PM	Modified By	Harshita Shrivastava, 9/24/2025, 2:22 PM

Workflow Actions Edit

Immediate Workflow Actions

Type	Description
Email Alert	Application_Status_Updated

Time-Dependent Workflow Actions See an example

No workflow actions have been added. Before adding a workflow action, you must have at least one time trigger defined.

Raghav | P Workflow | Recently | Developer | Subject | +

Search Setup

Workflow Rules

Workflow Rule **Send_Application_Submitted_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_Application_Submitted_Email	Object	Internship Application
Active	<input checked="" type="checkbox"/>	Evaluation Criteria	Evaluate the rule when a record is created
Description			
Rule Criteria Internship Application: Status EQUALS Submitted			
Created By	Harshita Shrivastava, 9/24/2025, 2:07 PM	Modified By	Harshita Shrivastava, 9/24/2025, 2:15 PM

Workflow Actions Edit

Immediate Workflow Actions

Type	Description
Email Alert	Internship Application Submitted Alert

Time-Dependent Workflow Actions See an example

! You cannot add new time triggers to an active rule. [Deactivate This Rule](#)

Tasks: Task setup was finished in the previous step. No additional changes are needed for tasks.

Custom Notifications – Internship Management System

1. Internship Application Submitted

- Name: Application_Submitted_Notification
- Supported Channels: Desktop, Mobile

2. Internship Application Approved

- Name: Application_Approved_Notification
- Supported Channels: Desktop, Mobile

3. Internship Application Rejected

- Name: Application_Rejected_Notification
- Supported Channels: Desktop, Mobile

4. Internship Completed

- Name: Application_Completed_Notification
- Supported Channels: Desktop, Mobile

Custom Notifications

Custom Notification Types

Send custom notifications using [Flows](#) or [Process Builder](#)

NOTIFICATION NAME	API NAME	NAMESPACE
Application_Approved_Notification	Application_Approved_Notification	
Application_Completed_Notification	Application_Completed_Notification	
Application_Rejected_Notification	Application_Rejected_Notification	
Application_Submitted_Notification	Application_Submitted_Notification	
enablement_coaching_feedback_ready	enablement_coaching_feedback_ready	

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