

Phase 5: Data Management & Deployment

Project: EdTech Enrollment Automation | Author: Parth Khare

Data Management Strategy

1. Field Audit & Naming Consistency

Reviewed all custom fields on Enrollment__c, Student__c, and Course__c
Ensured consistent naming conventions (Enrollment_Status__c, Enrollment_Date__c)
Added help text for admin usability and future maintenance
Deprecated unused fields and flagged them for archival

Setup

Home

Object Manager

Enrollment

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

Enrollment Custom Field

Enrollment Status

Back to Enrollment

Validation Rules (1)

Custom Field Definition Detail

Edit

Set Field-Level Security

View Field Accessibility

Where is this used?

Field Information

Field Label	Enrollment Status	Object Name	Enrollment
Field Name	Status	Data Type	Picklist
API Name	Status__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Parth Khare, 9/13/2025, 5:02 AM	Modified By	Parth Khare, 9/25/2025, 4:18 AM

General Options

Required

Default Value

Enrollment Field

Enrollment Name

Back to Enrollment

Set Field-Level Security

View Field Accessibility

Field Information

Field Label	Enrollment Name	Field Name	Name
Data Type	Text(80)		
Description			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

Validation Rules

New

No validation rules defined.

2. Picklist Handling

Identified Status__c as a picklist field

Used ISPICKVAL(Status__c, "Approved") in validation rules and Apex triggers Avoided TEXT(Status__c) due to formula compatibility issues

Active and inactive picklist values4 (1,000 max)

Field Dependencies

New

Field Dependencies Help ?

No dependencies defined.

Validation Rules

New

Validation Rules Help ?

Action	Rule Name	Error Message	Active	Modified By
Edit Del	Status_Must_Be_Selected	Status is required.	<input checked="" type="checkbox"/>	Parth Khare, 9/24/2025, 11:35 AM

Values

NewReorderReplacePrintable ViewChart Colors

Delete SelectedDeactivate SelectedReplace Selected

Values Help ?

<input type="checkbox"/> Action	Values	API Name	Default	Chart Colors	Modified By
<input type="checkbox"/> Edit Del Deactivate	Applied	Applied	<input type="checkbox"/>	Assigned dynamically	Parth Khare, 9/13/2025, 5:02 AM
<input type="checkbox"/> Edit Del Deactivate	Approved	Approved	<input type="checkbox"/>	Assigned dynamically	Parth Khare, 9/13/2025, 5:02 AM
<input type="checkbox"/> Edit Del Deactivate	Rejected	Rejected	<input type="checkbox"/>	Assigned dynamically	Parth Khare, 9/13/2025, 5:02 AM
<input type="checkbox"/> Edit Del Deactivate	In progress	In progress	<input type="checkbox"/>	Assigned dynamically	Parth Khare, 9/13/2025, 5:02 AM

Inactive Values

Delete Unused Values

Inactive Values Help ?

3. Validation Rule Optimization

Refactored Require_Status_Selection to: ISPICKVAL(Status__c, "") && NOT(ISNEW())

Prevented premature modal errors during record creation
Documented picklist quirks and safe formula practices

Enrollment Validation Rule

Back to Enrollment

Help for this Page ?

Validation Rule Detail

EditClone

Rule Name	Date_Cannot_Be_in_the_Past	Active	<input checked="" type="checkbox"/>
Error Condition Formula	AND(NOT(ISBLANK(Review_Date__c)), Review_Date__c < TODAY())		
Error Message	review date cannot be before creation date	Error Location	Review Date
Description			
Created By	Parth Khare, 9/24/2025, 11:20 AM	Modified By	Parth Khare, 9/24/2025, 11:34 AM

EditClone

Enrollment Validation Rule

Back to Enrollment

Help for this Page ?

Validation Rule Detail

EditClone

Rule Name	Validate_Student_Email_Format	Active	<input checked="" type="checkbox"/>
Error Condition Formula	ISBLANK(Student_email__c)		
Error Message	this field cannot be blank	Error Location	Student email
Description			
Created By	Parth Khare, 9/24/2025, 11:16 AM	Modified By	Parth Khare, 9/24/2025, 11:35 AM

EditClone

4. Record Type Strategy

Confirmed use of "Internal" and "External" Record Types for Enrollment

Created formula fields (IsInternal__c, IsExternal__c) to support Lightning Page visibility filters
Avoided direct Record Type filters due to Lightning App Builder limitations

The screenshot shows the 'Lightning Page Detail' interface for a page named 'EnrollmentV1_Record_Page'. The page is titled 'Lightning Page Detail' and has buttons for 'Edit', 'Clone', and 'Delete'. Below the title bar, there is an 'Information' section with fields for 'Name' (EnrollmentV1_Record_Page), 'Label' (EnrollmentV1 Record Page), and 'Description'. Below this, there is an 'Assignments By App' section with a table showing the app 'EdTech Enrollment' and its form factor 'Desktop and phone'. Below that, there is an 'Assignments By App, Record Type, and Profile' section with a table showing assignments for 'EdTech Enrollment' across various record types and profiles.

App	Form Factor
EdTech Enrollment	Desktop and phone

App	Record Type	Profile	Form Factor
EdTech Enrollment	External	Counselor	Desktop and phone
EdTech Enrollment	Internal	Counselor	Desktop and phone
EdTech Enrollment	Master	Counselor	Desktop and phone
EdTech Enrollment	External	Standard User	Desktop and phone
EdTech Enrollment	Internal	Standard User	Desktop and phone
EdTech Enrollment	Master	Standard User	Desktop and phone
EdTech Enrollment	External	System Administrator	Desktop and phone
EdTech Enrollment	Internal	System Administrator	Desktop and phone
EdTech Enrollment	Master	System Administrator	Desktop and phone

5. Email Template Management

Migrated from Email Alerts to Send Email Actions for dynamic notifications
Organized templates under “Enrollment Notifications” folder
Enabled merge fields and conditional logic for personalized messaging

Deployment Strategy

1. Packaging & Metadata

Created Change Set with:

- Flows: Enrollment Automation, Fault Logging
- Apex Triggers: PreventFutureEnrollmentDate, AutoAssignEnrollmentOwner, LogEnrollmentStatusChange
- Custom Fields, Validation Rules, Email Templates
- Quick Actions and Lightning Page assignments

2. Pre-Deployment Checklist

Sandbox testing: simulated record creation, Flow triggers, Apex logic
Profile & Permission Set review: ensured access to all fields and objects

Visibility filter testing: confirmed Lightning Page renders correctly for all Record

Types 3. Post-Deployment Tasks

Created test Enrollment record to validate:

Flow execution

Trigger logic

Email delivery

Status change logging

Monitored Enrollment_Log__c and Flow_Error_Log__c for 48 hours

Issue	Resolution	Notes
Validation rule firing on modal open	Added NOT(ISNEW())	Prevented UI block
Picklist field causing formula errors	Used ISPICKVAL()	Avoided TEXT() pitfalls
Blank screen on record creation	Set default value for Status__c	Ensured UI stability

Visibility filters failing	Used formula fields	Avoided Record Type limitations
Field renaming risk	Relabeled instead of renaming API name	Preserved Flow and Apex references