

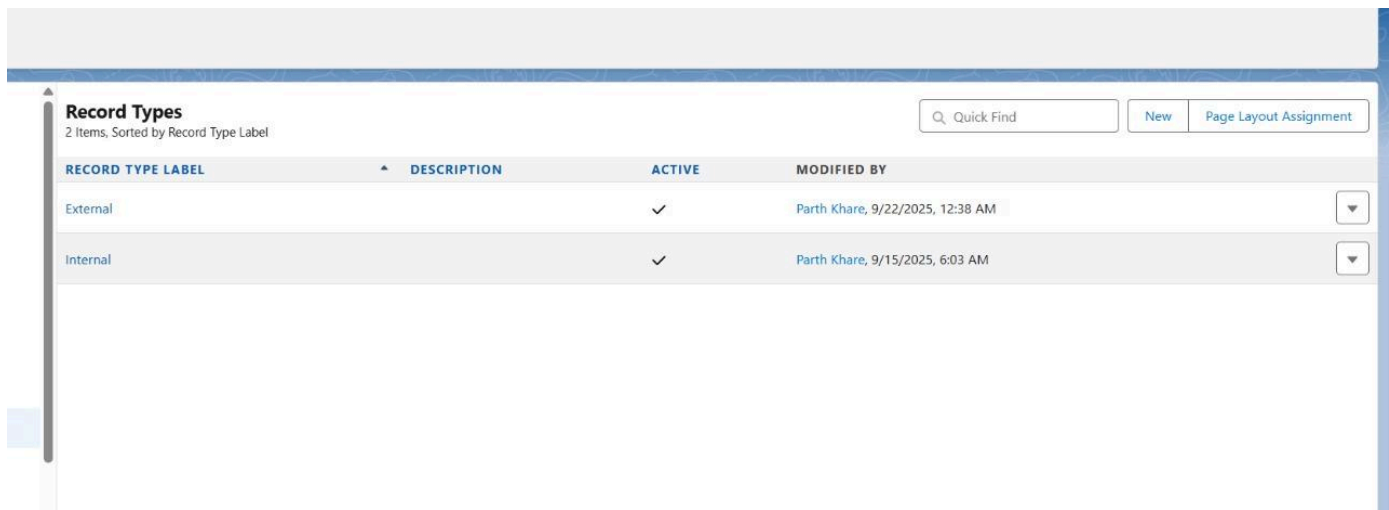
# Phase 3: Flow Logic, UI Customization & Record Automation

This phase focuses on building intelligent automation, customizing user experience, and managing record behavior based on enrollment status.

## 1. Record Types Setup

Created multiple record types for the Enrollment object:  
New  
Approved  
Rejected  
Waitlisted

Assigned picklist values per record type to control field behavior.  
Mapped record types to profiles:  
Admin: Full access to all types  
Counselor: Limited to Approved, Waitlisted  
Student: View-only access (if exposed via Experience Cloud)



Record Types			
2 Items, Sorted by Record Type Label			
<div>Quick Find</div> <div>NewPage Layout Assignment</div>			
RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
External		✓	Parth Khare, 9/22/2025, 12:38 AM
Internal		✓	Parth Khare, 9/15/2025, 6:03 AM

## 2. Lightning Page Customization

Customized

Lightning record pages

for Enrollment:

Tabs: Details, Related, History

Dynamic component visibility:

Example: "Orientation Info" section only appears when Status\_\_c = "Approved"

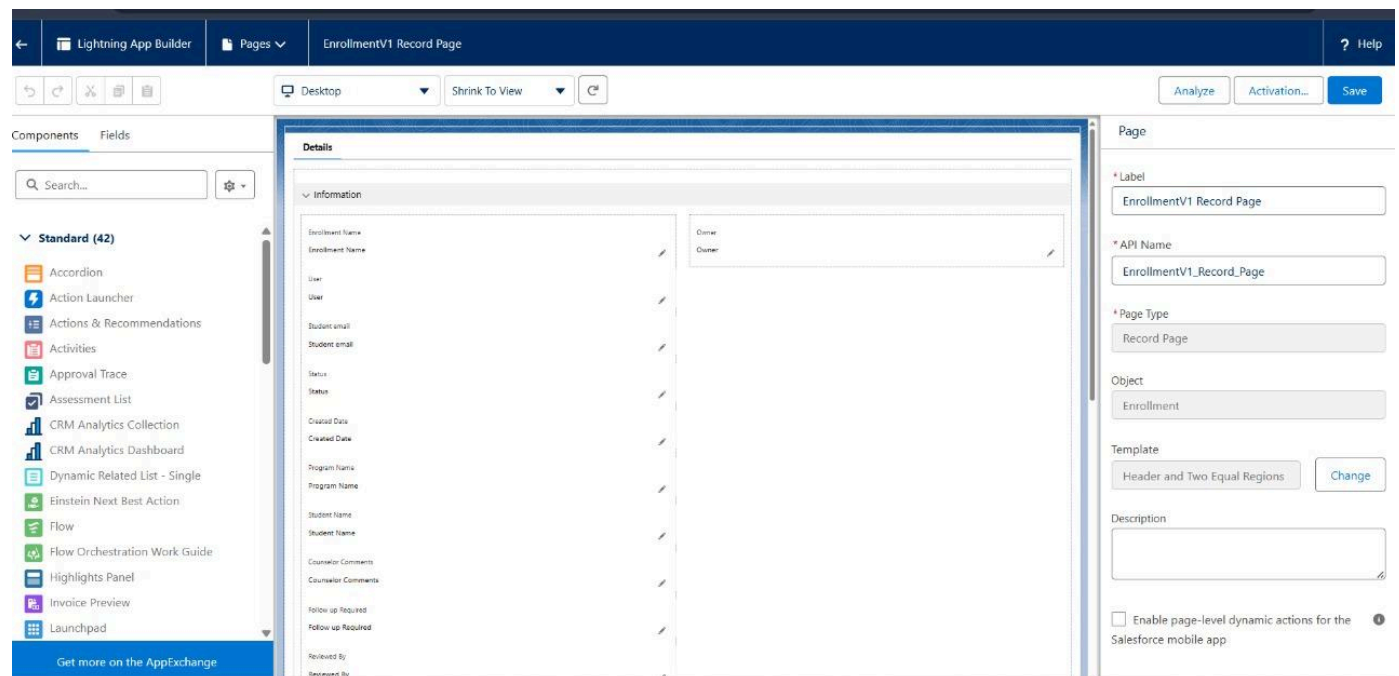
Created a

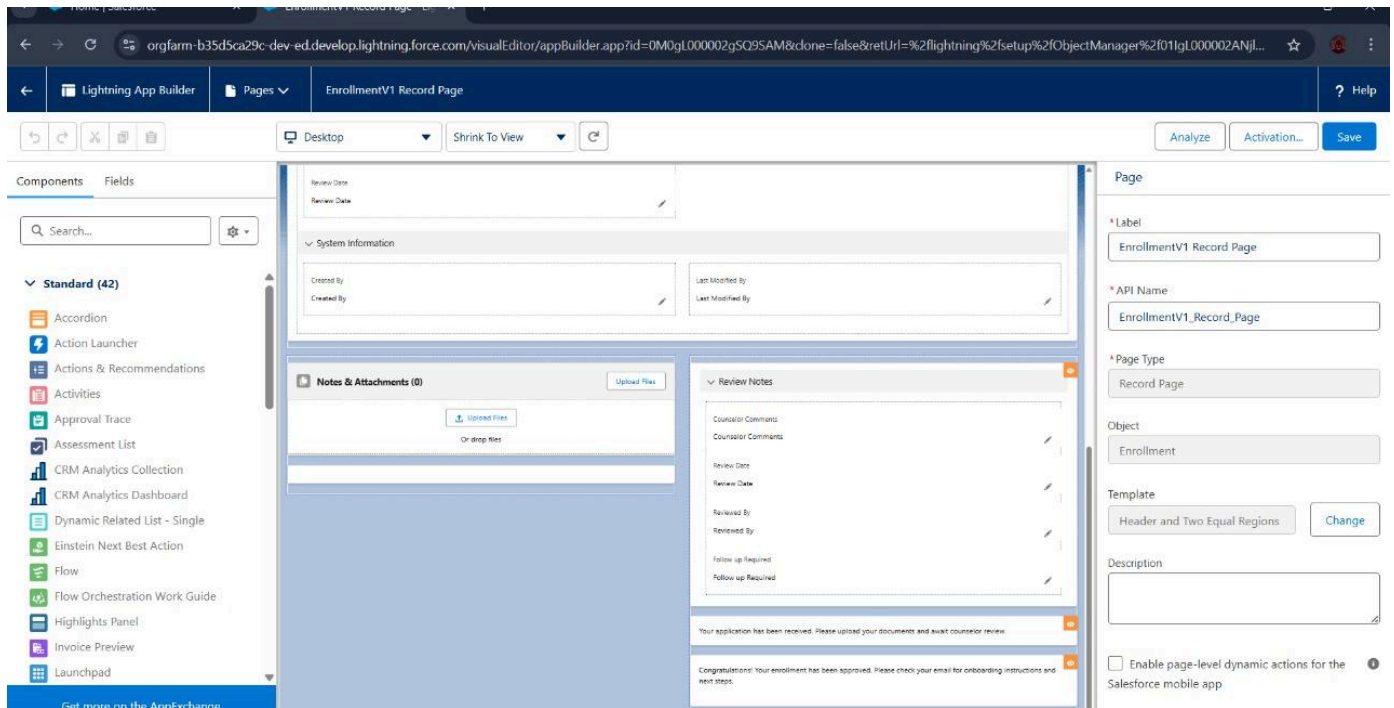
custom Lightning App

for Enrollment Management:

Added relevant objects and tabs

Assigned to Counselor and Admin profiles





### 3. Record-Triggered Flow

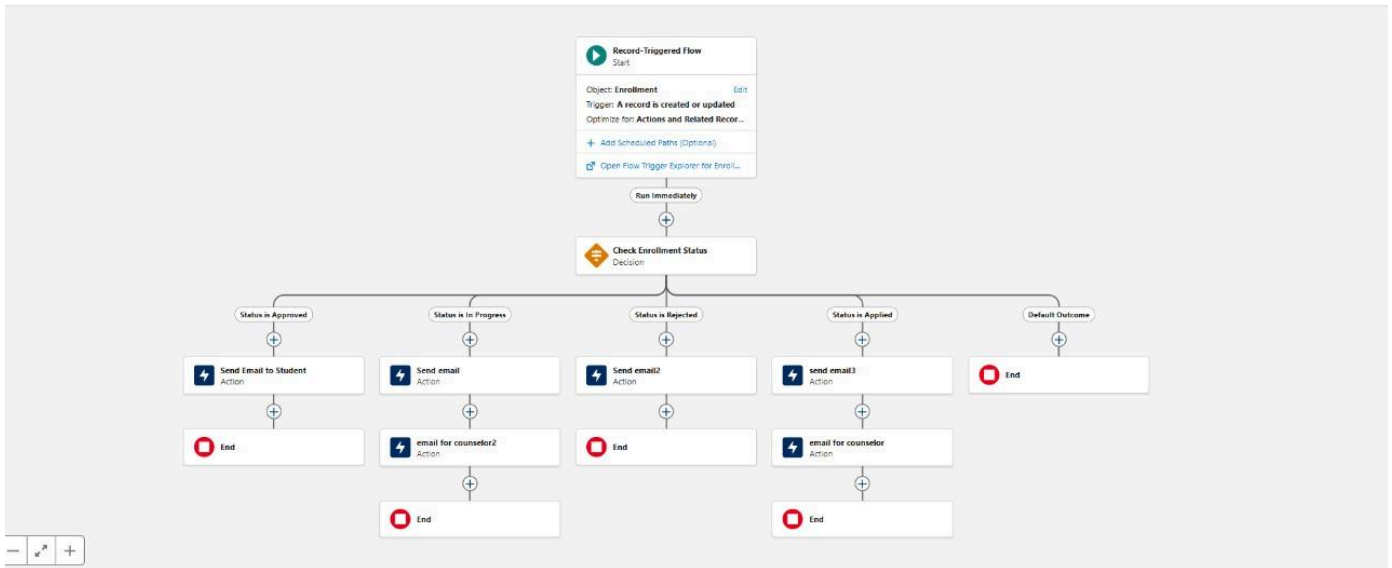
Built a Record-Triggered Flow on the Enrollment object.

Triggered on create or update.

Entry condition: `TEXT(Status__c) = "Approved"`

Optimization: Run Immediately Actions and Related Records

Purpose: Automate downstream actions like task creation and email alerts



## 4. Decision Element: Status Check

Added a Decision element labeled Status Check

Outcomes:

Approved: Triggers onboarding actions

Rejected: Sends regret email and logs rejection reason

Waitlisted: Notifies counselor for follow-up

Example condition:

`TEXT(Status__c) = "Reject"`

Decision

\* Label

Check Enrollment Status

\* API Name ⓘ

Check\_Enrollment\_Status

Description

Outcomes

For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.

OUTCOME ORDER ⓘ +

Status is Approved

Status is In Progress

Status is Rejected

Status is Applied

Default Outcome

\* Label

Status is Approved

\* Outcome API Name ⓘ

Status\_is\_Approved

Condition Requirements to Execute Outcome

All Conditions Are Met (AND) ▼

Resource

Operator

Value

...gering Enrollment\_\_c > Status X

Equals ▼

Aa Approved X

+ Add Condition

When to Execute Outcome ⓘ

☒ If the condition requirements are met
 ☐ Only if the record that triggered the flow to run is updated to meet the condition requirements

## 5. Email Alerts Based on Status

Configured

Send Email

actions for each status outcome:

Approved: Welcome email to student

Rejected: Regret notification with contact info

Waitlisted: Reminder email to counselor


Used merge fields in email body: Hello {!\$Record.Student\_Name\_\_c}, your enrollment status is now {!\$Record.Status\_\_c}.

Recipient: {!\$Record.Student\_Email\_\_c} or static email for testing

## Send Email

\* Label

Send Email to Student

\* API Name 

Send\_Email\_to\_Student

Description

Use values from earlier in the flow to set the inputs for the "Send Email" core action. To use its outputs later in the flow, store them in variables.

### Set Input Values

#### ▼ Configure Recipient Details

A<sub>a</sub> Recipient Address List 

A<sub>a</sub> ...of Triggering Enrollment\_c > Student email X

A<sub>a</sub> Recipient Address Collection 

Enter value or search resources...



**Send Email**

**Compose Email Content**  
Set email details and compose message.

**Use Email Template**  
Select an existing email template.

**Subject**  
Your Enrollment Status Update

**Body**

Insert a resource... View as Rich Text

Dear {!Student\_Name\_\_c},  
Thank you for applying to the  
{!Program\_Name\_\_c} program. We wanted to  
update you on your current enrollment status:  
Status: {!Status\_\_c}  
If your status is "In Progress," our team is  
reviewing your application and will reach out if  
any additional information is needed. If your  
status is "Approved," congratulations! You are  
officially enrolled. If your status is "Applied,"  
your application has been received and is  
under initial review. If your status is "Rejected,"

Salesforce Sans 12

## 6. Optional Approval Process(i have not done this since in flow it is easily managed)

Designed a multi-step

Approval Process

(if needed):

Triggered when Status\_\_c = "Submitted"

Step 1: Counselor reviews

Step 2: Admin approves

Final action: Update Status\_\_c = "Approved" and send confirmation email

Used field updates and email alerts to reflect approval stages

Added visual indicators (e.g., status badge on Lightning page)

## 7. Page Layouts & Compact Layouts

Created

custom page layouts

per profile:

Admin: Full field visibility

Counselor: Focused layout with actionable fields

Defined

Compact Layout

for mobile and list views:

Fields: Student\_Name\_\_c, Status\_\_c, Program\_Type\_\_c, Enrollment\_Date\_\_c