

Phase 4: Flow Logic & Automation

Project: EdTech Enrollment Automation | Author: Parth Khare

Objective

Automate enrollment status updates and notifications using Flow Builder, with fault handling and dynamic email logic via Send Email Actions.

Flow Configuration

Use Case: Notify Student on Status Change

Flow Type: Record-Triggered Flow
Object: Enrollment__c
Trigger: When Status__c is updated or created
Condition: blank
Action: Send Email Action

Configure Start

Select Object

Select the object whose records trigger the flow when they're created, updated, or deleted.

*Object

Enrollment

Configure Trigger

Trigger the Flow When:

☐ A record is created

☐ A record is updated

☒ A record is created or updated

☐ A record is deleted

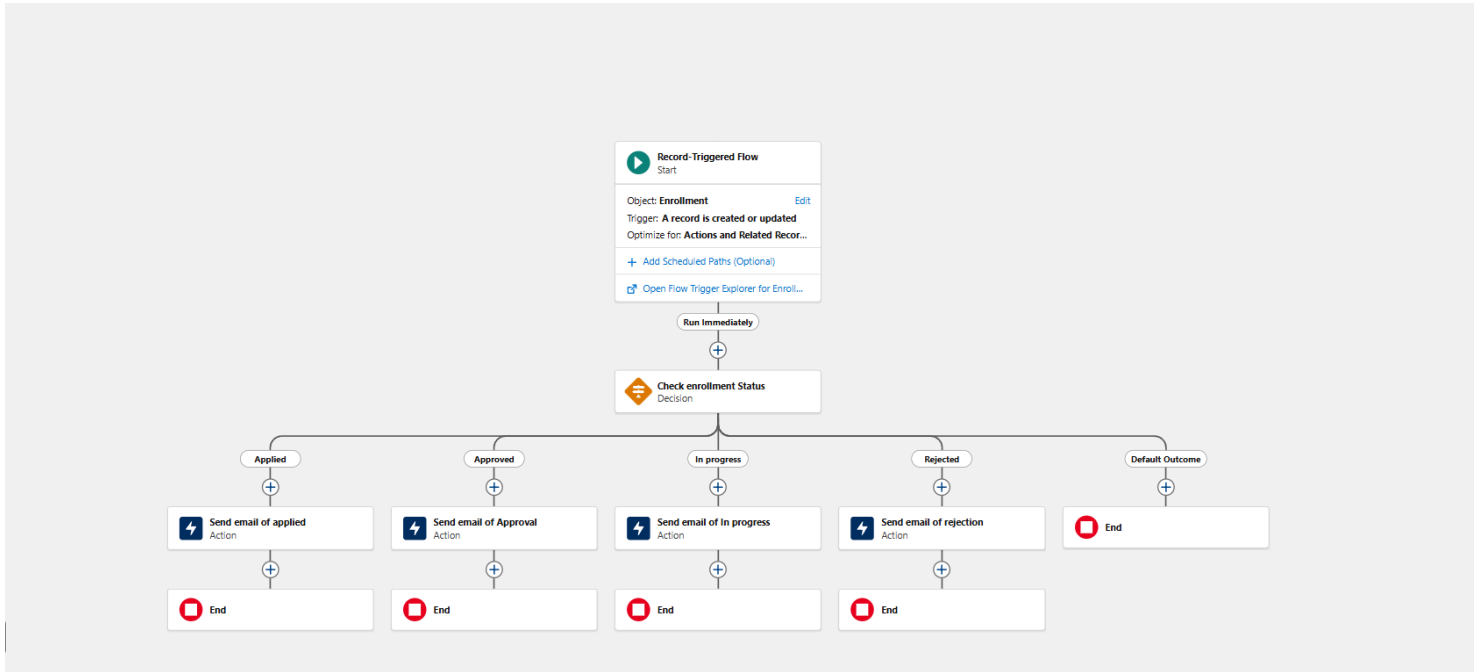
Set Entry Conditions

Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

Condition Requirements

None



Send Email Action Setup

1.

Email Template

Folder: Enrollment Notifications
Subject: "Your Enrollment Status Has Changed"
Body: Hello {!Enrollment__c.Student__r.Name},
Your enrollment status is now: {!Enrollment__c.Status__c}.
Please check your dashboard for next steps.

Merge Fields: Student__r.Name, Status__c

✓ Configure Recipient Details

A_a Recipient Address List ⓘ

A_a Triggering Enrollment__c > Student email ✕

A_a Subject ⓘ

Update on Your Enrollment Application



A_a Body ⓘ

Insert a resource...

View as Rich Text ▾

Subject: Application Received –
!\$Record.Program_Name__c

Dear !\$Record.Student_Name__c,

We've received your application for the
!\$Record.Program_Name__c program. Our
team is currently reviewing your submission.

You'll receive further updates as your
application progresses.

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2.Recipient Configuration

To Address: Enrollment__c.Student__r.Email
CC/BCC: Optional (e.g., Admin email)

Challenge	Solution	Notes
Email Alert limitations	Switched to Send Email Action	Enabled dynamic logic
No fault handling in alerts	Used fault paths in Flow	Logged errors to custom object
Merge field flexibility	HTML templates with variables	Personalized communication