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)

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

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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

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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) = "Rejected"

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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

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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