

# Library Management:- Phase 4: Process Automation (Admin)

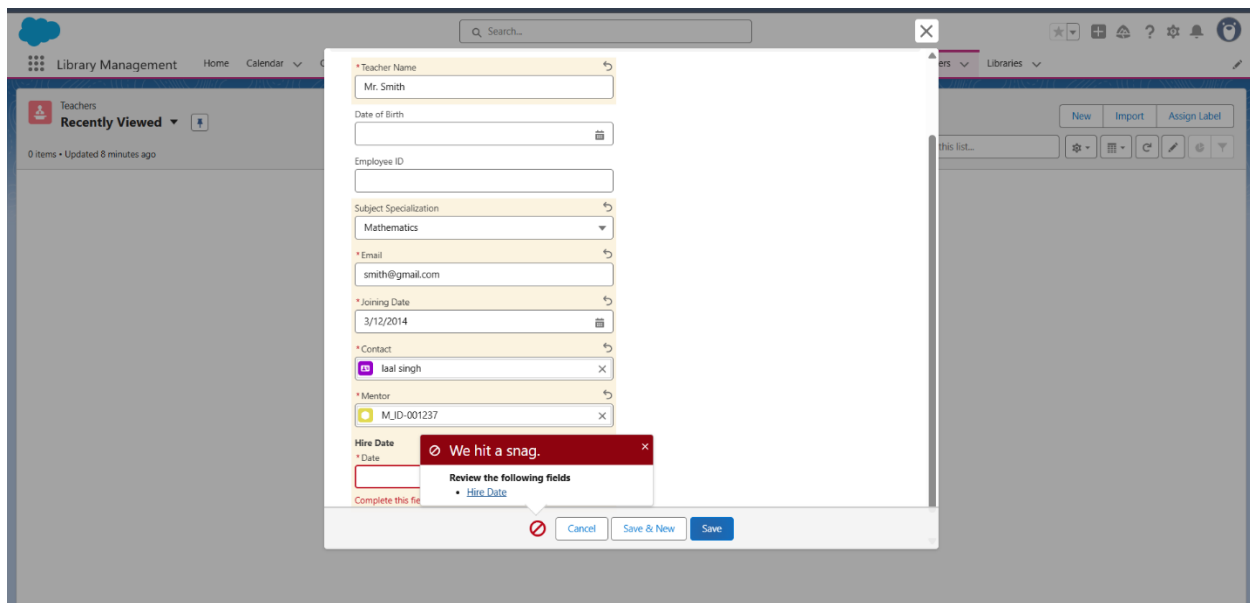
## 1. Validation Rules

- A validation rule created on Teacher object HireDate\_Not\_Future Date/ Time Hire Date cannot be blank or in the future.
- A validation rule created on Teacher object Email\_Blank Please enter a valid email address.

The screenshot shows the Salesforce Setup interface. The top navigation bar includes the Salesforce logo, a search bar labeled 'Search Setup', and several utility icons. Below the navigation bar, the breadcrumb trail reads 'Setup > OBJECT MANAGER'. The main section is titled 'Teacher' and contains a left-hand sidebar with a list of configuration options: Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules, Object Access, Triggers, Flow Triggers, Validation Rules (highlighted), and Conditional Field Formatting. The main content area is titled 'Validation Rules' and shows '2 Items, Sorted by Rule Name'. It contains a table with the following data:

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Email_Blank	Email	Please enter a valid email address.	✓	Margeet Urmaliya, 9/22/2025, 10:39 AM
HireDate_Not_Future	Hire Date	Hire Date cannot be blank or in the future.	✓	Margeet Urmaliya, 9/22/2025, 9:34 AM

ValidationRules

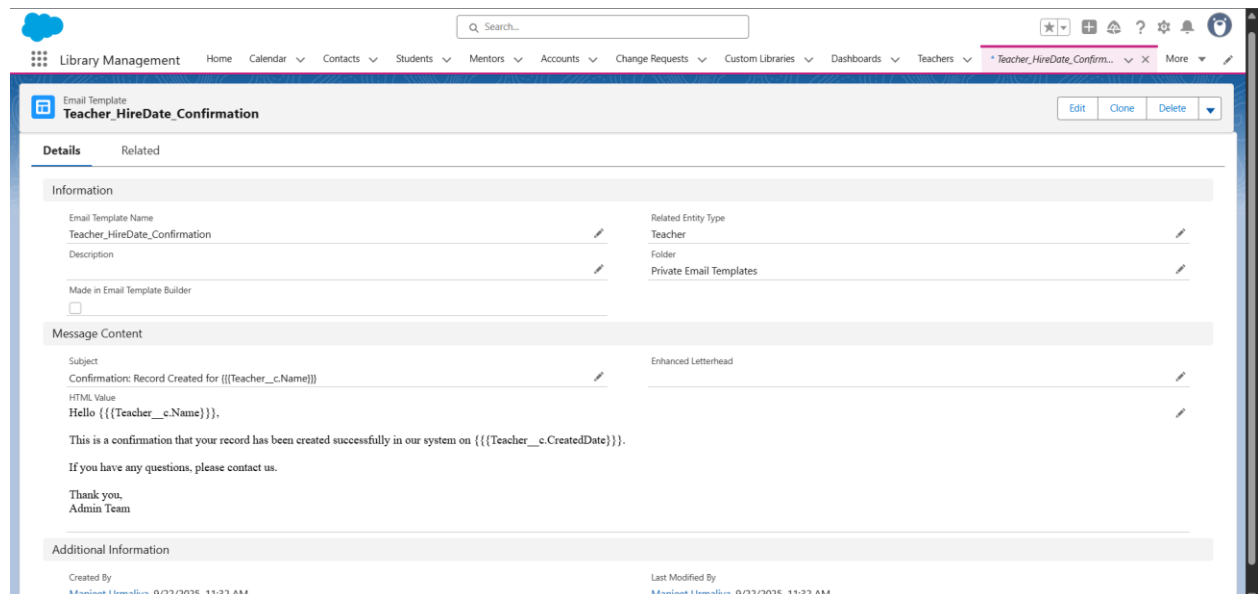


## Validation RulesTesting

## 2. Email Templates for Automation

Two classic email templates were created and stored under Private Email Templates:

- Teacher\_HireDate\_Confirmation – sends confirmation to the teacher when a date is created or confirmed.



## Teacher\_HireDate\_Confirmation

- Teacher\_HireDate\_Reminder:-

The screenshot shows the configuration page for an email template named "Teacher\_HireDate\_Reminder". The page is divided into sections: Information, Message Content, and Additional Information. The Information section includes fields for Email Template Name, Description, and Made in Email Template Builder. The Message Content section includes fields for Subject, HTML Value, and Enhanced Letterhead. The Additional Information section includes fields for Created By and Last Modified By.

Information	
Email Template Name	Teacher_HireDate_Reminder
Description	
Made in Email Template Builder	<input type="checkbox"/>
Related Entity Type	Teacher
Folder	Private Email Templates

Message Content	
Subject	Reminder: Your Hire Date is {{{Teacher_c.Hire_Date_c}}}
HTML Value	Hello {{{Teacher_c.Name}}},  This is a reminder that your hire date is {{{Teacher_c.Hire_Date_c}}}.  Thank you, HR Team
Enhanced Letterhead	

Additional Information	
Created By	Manjeet Urmaliya, 9/22/2025, 11:20 AM
Last Modified By	Manjeet Urmaliya, 9/22/2025, 11:21 AM

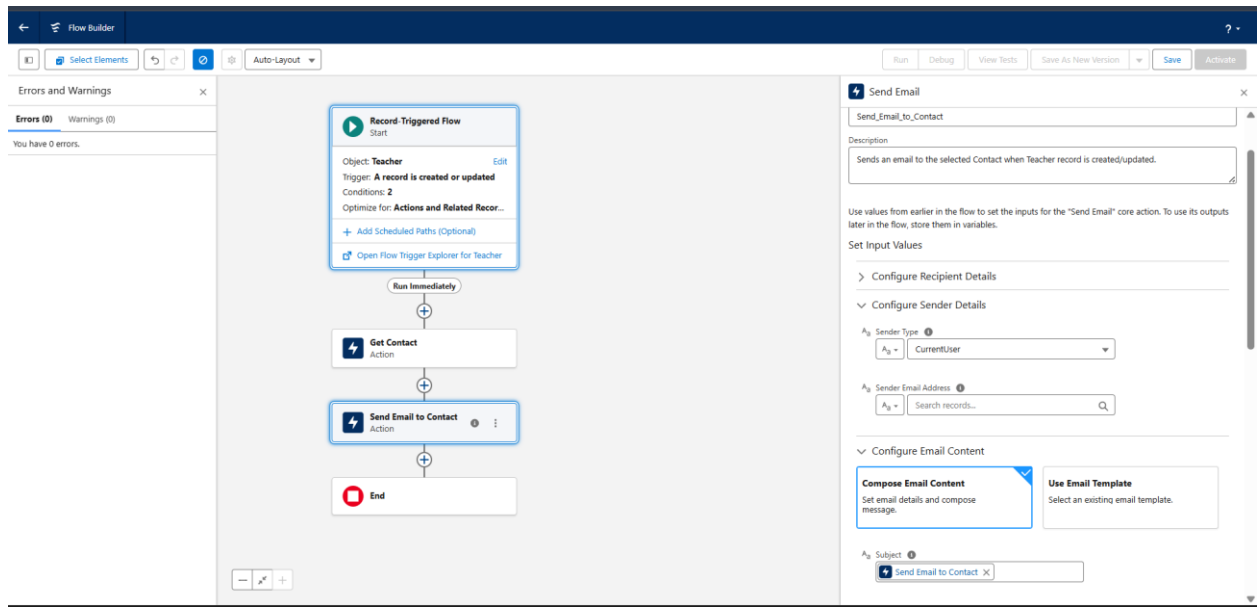
Teacher\_HireDate\_Reminder

### 3.Flow for TeacherConfirmation :-

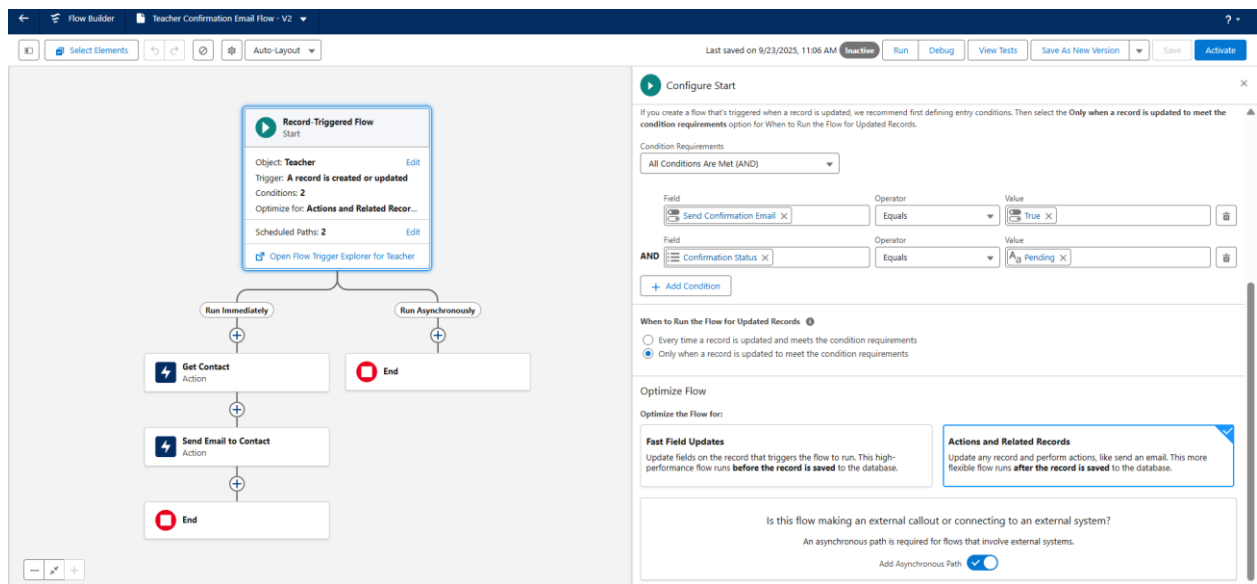
A record-triggered flow "Teacher\_Confirmation\_Flow" built on Teacher object:

Trigger: When record is created or when Status changes to "Confirmed."

- Action:
- Update "Confirmation Sent" checkbox on the Teacher.



#### 4. Reminder Notification & Email (Scheduled Path)



#### 6. Quick Action – “Mark as Completed”

A Quick Action added Teacher object:

- Action Type: Update a Record.
- Predefined Field Values: Status c = “Completed.”

Setup Home Object Manager

Search Setup

SETUP > OBJECT MANAGER

### Teacher

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

Restriction Rules

Scoping Rules

Object Access

Teacher Action

#### Mark as Completed

Pr predefined Field Values (1)

**Action Detail**

Label	Mark as Completed	Object Name	Teacher
Standard Label Type		Action Type	Update a Record
Name	Mark_as_Completed	Icon	
Description	Updates the record status to Completed		
Success Message			
Created By	Manjeet Urmaliya, 9/22/2025, 10:46 PM	Modified By	Manjeet Urmaliya, 9/22/2025, 10:46 PM

[Edit](#) [Delete](#) [Edit Layout](#)

**Predefined Field Values**

Action	Field Name	API Name	Field Type	Value
<a href="#">Edit</a> <a href="#">Del</a>	Confirmation Status	Confirmation_Status__c	Picklist	Email Sent

[Back To Top](#)

Always show me more records per related list

## 8. Testing & Results

Sample Appointments were created to test the automation:

Compose

Mail

Chat

Meet

Inbox 189

Starred

Snoozed

Sent

Drafts 12

More

Labels +

1 of 1,333

### Your Teacher Profile is Confirmed

Manjeet Urmaliya via 6vegbjata172y6-gl-7xhypua0.can98.bnc.salesforce.com to me

13:38 (0 minutes ago)

Dear Mr. Smith,

Welcome! Your profile has been successfully added to our system.

Details:

Hire Date:

Department:

Position:

If you have any questions, please reach out to our admin team.

Best regards,

The Admin Team

[Reply](#) [Forward](#)