

Phase 4: Process Automation (Admin)

Key Activities:

- Validation Rules
- Workflow Rules
- Process Builder
- Approval Processes
- Flow Builder (Screen, Record-Triggered, Scheduled, Auto-launched)
- Email Alerts, Field Updates, Tasks, Custom Notifications

Description:

For Institute Management System:

1. Validation Rules:

- Prevent duplicate Student Roll Numbers.
- Ensure Attendance cannot be future-dated.

2. Workflow / Process Builder:

- Send email alert when attendance < 75%.
- Auto-assign new student to counselor.

3. Flows:

- Screen Flow: Student self-enrollment.
- Record-Triggered Flow: Auto-create attendance record on enrollment.
- Scheduled Flow: Monthly summary tasks for teachers.

4. Approval Processes:

- Approval for fee refund requests.

Outcome:

Automation reduces manual work and ensures consistent processes.

