

Phase 4: Process Automation (Admin)

Validation Rules

1. Date_of_Birth_Not_in_Future

Attribute	Details
Rule Name	Date_of_Birth_Not_in_Future
Field Affected	Date of Birth (Date_of_Birth__c)
Purpose	To prevent users from incorrectly entering a future date as the student's date of birth.
Formula / Logic	The rule fires (returns TRUE) if the value of the Date_of_Birth__c field is later than the current date. (Formula equivalent: Date_of_Birth__c > TODAY())
Error Message	"The Date of Birth cannot be in the future. Please select a valid date."

SETUP > OBJECT MANAGER

Student

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

Triggers

Flow Triggers

Validation Rules

Conditional Field Formatting

Student Validation Rule

Define a validation rule by specifying an error condition and a corresponding error message. The error condition is written as a Boolean formula expression that returns true or false. When the formula expression returns true, the save will be aborted and the error message will be displayed. The user can correct the error and try again.

Validation Rule Edit

Save Save & New Cancel

Rule Name

Date_of_Birth_Not_in_Future

Active

☒

Description

Ensures that the student's date of birth is not a future date.

Error Condition Formula

Example: Discount_Percent__c > 30% More Examples...

Display an error if Discount is more than 30%

If this formula expression is true, display the text defined in the Error Message area

Insert Field

Insert Operator

Date_of_Birth__c > TODAY()

Check Syntax

Functions

All Function Categories

ABS

ACOS

ADDMONTHS

AND

ASIN

ASIN

Insert Selected Function

ABS(Number)

Returns the absolute value of a number. A number without its sign.

Help on this Function

Error Message

Example: Discount percent cannot exceed 30%

This message will appear when Error Condition formula is true

Error Message

The Date of Birth cannot be in the future. Please select a valid date.

This error message can either appear at the top of the page or below a specific field on the page

Error Location ☐ Top of Page ☒ Field

Date of Birth

Save

Save & New

Cancel

Quick Tips

Operators & Functions

2. DOB_At_Least_5_Years_Ago

Attribute	Details
Rule Name	DOB_At_Least_5_Years_Ago
Field Affected	Date of Birth (Date_of_Birth__c)
Purpose	To enforce the minimum enrollment requirement that a student must be at least 5 years old at the time of record creation or update. The rule fires (returns TRUE) if the calculated age of the student is less than 5 years. (Formula equivalent: YEAR(TODAY()) - YEAR(Date_of_Birth__c) < 5 or ADDMONTHS(Date_of_Birth__c, 60) > TODAY())
Formula / Logic	
Error Message	"The student age shouldn't be less than 5 years."

The screenshot shows the 'Student Validation Rule' configuration page in Salesforce. The left sidebar contains navigation links: 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, Triggers, Flow Triggers, Validation Rules (selected), and Conditional Field Formatting.

The main content area is titled 'Student Validation Rule' and includes a description: 'Define a validation rule by specifying an error condition and a corresponding error message. The error condition is written as a Boolean formula expression that returns true or false. When the formula expression returns true, the save will be aborted and the error message will be displayed. The user can correct the error and try again.'

The 'Validation Rule Edit' section contains the following fields:

- Rule Name: **DOB_At_Least_5_Years_Ago**
- Active: ☒
- Description: Ensures the student's date of birth is at least 5 years in the past.

The 'Error Condition Formula' section shows the formula: `DATE_OF_BIRTH__C > TODAY() - 1825`. A functions list is open, showing categories like ABS, ACOS, ADDMONTHS, AND, ASCII, and ASIN. The 'Error Message' section shows the message: 'The student age shouldn't be less than 5 years.'

3. Prevent_Notes_Edit_After_Resolved

Attribute	Details
Rule Name	Prevent_Notes_Edit_After_Resolved
Object Affected	Doubt Resolution (Doubt_Resolution__c)
Field Affected	Resolution Notes (Resolution_Notes__c)
Purpose	To enforce data integrity by preventing changes to the Resolution Notes once the status of the Doubt Resolution record has been marked as resolved.
Formula / Logic	The rule fires (returns TRUE) if both of these conditions are met: (1) The Status field is equal to 'Resolved', AND (2) The Resolution Notes field is being changed (ISCHANGED(Resolution_Notes__c)).
Error Message	"Resolution Notes cannot be edited after a doubt has been marked as resolved."

The screenshot shows the 'Validation Rule Edit' interface in Salesforce. The rule name is 'Prevent_Notes_Edit_After_Resolved'. The description is 'Ensures the Resolution Notes cannot be changed after a doubt is marked as resolved'. The error condition formula is `AND (ISCHANGED (Resolution_Notes__c), ISCHANGED (Resolution_Notes__c))`. The error message is 'Resolution Notes cannot be edited after a doubt has been marked as resolved'. The error location is set to 'Top of Page' and 'Field Resolution Notes__c'.

Validation Rule Edit

Rule Name:

Active: ☒

Description:

Error Condition Formula

Example: View Examples...

If this formula expression is true, display the text defined in the Error Message area

Functions

All Function Categories

- ABS
- ACOS
- ADDMONTHS
- AND
- ASIN

Error Message

Example:

This message will appear when Error Condition formula is true

Error Message:

This error message can either appear at the top of the page or below a specific field on the page

Error Location: ☐ Top of Page ☒ Field

4. End_Date_is_not_before_Start_Date

Attribute	Details
Rule Name	End_Date_is_not_before_Start_Date
Object Affected	Course (Course__c)
Field Affected	End Date (End_Date__c)
Purpose	To ensure that the Course End Date is logically set to occur after the Start Date.
Formula / Logic	The rule fires (returns TRUE) if the End Date is less than or equal to the Start Date. (Formula equivalent: End_Date__c <= Start_Date__c)
Error Location	End Date
Error Message	"The course End Date must be after the Start Date."

Course Validation Rule

Define a validation rule by specifying an error condition and a corresponding error message. The error condition is written as a Boolean formula expression that returns true or false. When the formula expression returns true, the save will be aborted and the error message will be displayed. The user can correct the error and try again.

Validation Rule Edit

Rule Name:

Active: ☒

Description:

Error Condition Formula

Example: [View Examples...](#)

Display an error if Discount is more than 30%.

If this formula expression is true, display the text defined in the Error Message area.

Functions

-- All Function Categories --

- ABS
- ACOS
- ADDMONTHS
- AND
- ASCII
- ASIN

[Insert Selected Function](#)

[Help on this function](#)

Error Message

Example:

This message will appear when Error Condition formula is true.

Error Message:

This error message can either appear at the top of the page or below a specific field on the page.

Error Location: ☐ Top of Page ☒ Field

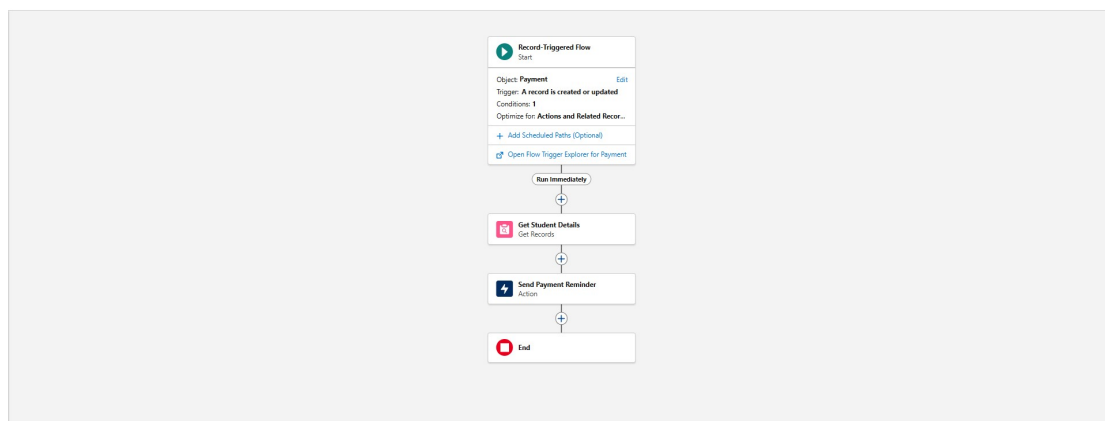
[Save](#) [Save & New](#) [Cancel](#)

Flow Builder (Screen, Record-Triggered, Scheduled, Auto-launched)

Business Automation

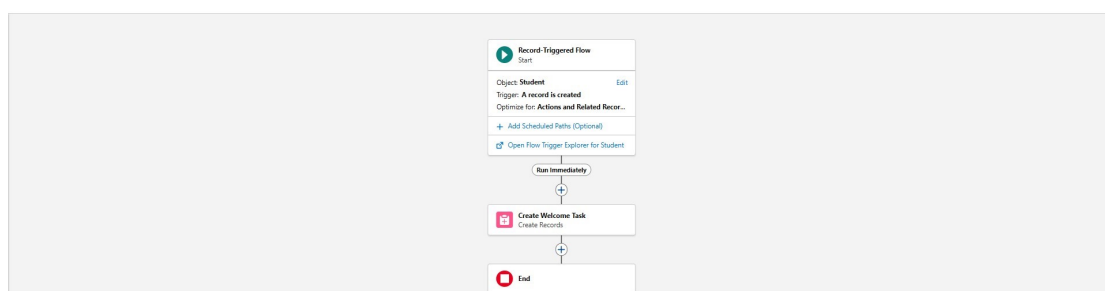
1. Payment Reminder Automation

This flow automatically sends an email to a student when their payment is overdue. It is a Record-Triggered Flow on the Payment object that runs when a record is created or updated. The flow's trigger conditions require that the Status field equals Pending and the Payment Date is less than or equal to the formula TODAY() - 7. Within the flow, a Get Records element finds the student's details using the Enrollment record. The subsequent Action element sends an email to the student with the payment details, including their name, the payment amount, and the course name, using the appropriate dynamic fields.



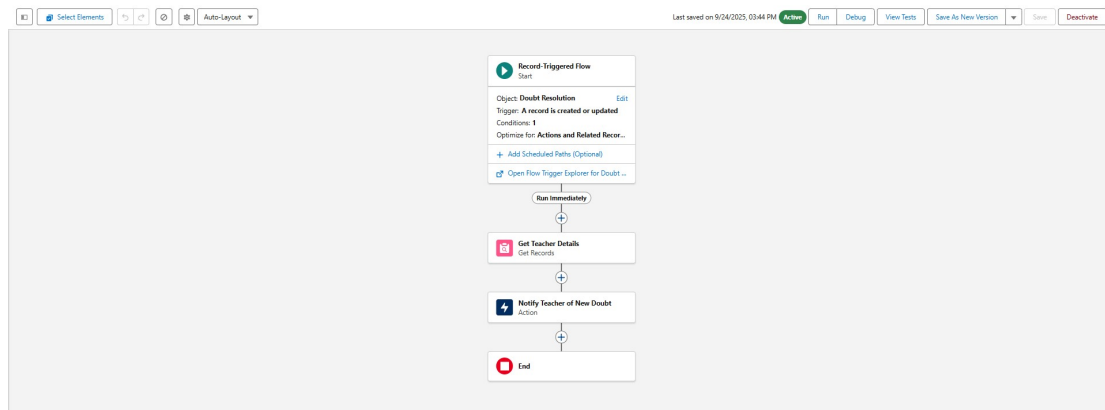
2. Welcome Task Automation

This flow automatically creates a task for the administrator to welcome a new student. It is a Record-Triggered Flow on the Student object that runs every time a record is created. There are no additional conditions for this flow. It contains a single Create Records element that creates a new Task record. The task is assigned to the user who created the student record using the Assigned To ID field mapped to the value `{!$Record.OwnerId}`. The Related To ID is mapped to `{!$Record.Id}` to link the task to the student record, and the Subject is set to "Welcome Call for `{!$Record.Name}`".



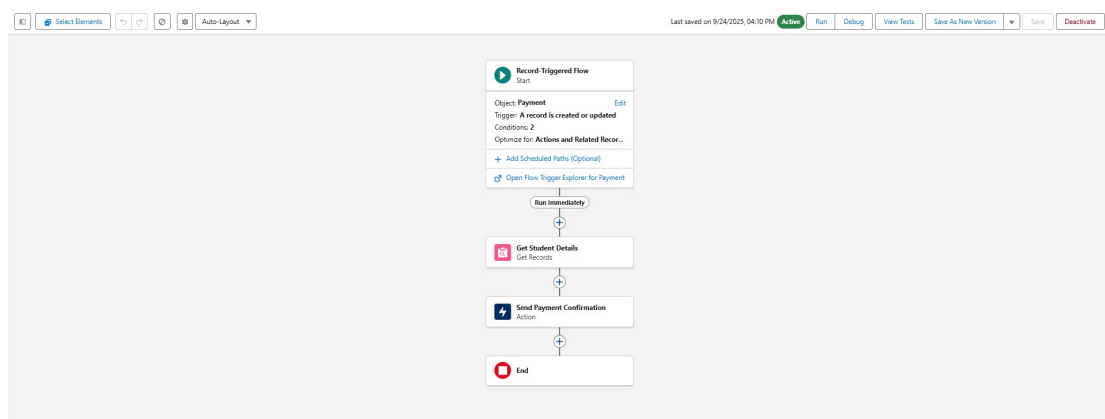
3. Doubt Resolution Automation

This flow notifies a teacher when a student assigns a doubt to them, allowing for a quick response. It is a Record-Triggered Flow on the Doubt Resolution object that runs when a record is created or updated. The flow's trigger conditions require that the Assigned_Teacher__c field is not null. A Get Records element finds the teacher's email address by matching the Record ID with the Assigned_Teacher__c field on the doubt record. An Action element then sends an email to the teacher using the dynamic email address from the Get Records element, with the subject "New Doubt Assigned to You".



4. Payment Confirmation Automation

This flow automatically sends a confirmation email to a student when their payment status is updated to Paid. It is a Record-Triggered Flow on the Payment object that runs when a record is created or updated. The flow's trigger conditions require that the Status field equals Paid and that the Status field was changed. A Get Records element finds the student's email address by navigating from the Payment to the Enrollment and then to the Student record. An Action element then sends the confirmation email with the student's name, the course name, and the payment amount.



5. New Student Onboarding Wizard

The New Student Onboarding Wizard is a crucial Screen Flow designed to streamline the administrative process of creating a new student record and linking their initial enrollment simultaneously. This flow is launched manually by an administrator from an embedded location (like the Home Page or Utility Bar). The logic runs in five sequential steps: first, it collects primary student details (Name, DOB, Email) and uses a Create Records element to save the Student record, crucially storing the new Student ID. Next, it collects enrollment-specific data (Course, Amount, Date). A second Create Records element then saves the Enrollment record, utilizing the stored Student ID to establish the mandatory lookup relationship and setting the Status__c to a hardcoded value like 'Paid' or 'Pending'. The transaction is completed with a Success Screen displaying confirmation. Key to data integrity, the flow enforces a custom validation rule requiring the student's age to be at least 5 years old.

