**Student Registration Portal - Phase 4: Process Automation (Admin)**

**Validation Rules**

**Student\_\_c Validation Rules**

**1. Email\_Domain\_Validation**

* **Rule Name**: Email\_Domain\_Validation
* **Object**: Student\_\_c
* **Formula**:

NOT(CONTAINS(Email\_\_c, "@university.edu")) && NOT(ISBLANK(Email\_\_c))

* **Error Message**: "Email must be a valid university email address ending with @university.edu"
* **Error Location**: Email\_\_c field

**2. Age\_Minimum\_Validation**

* **Rule Name**: Age\_Minimum\_Validation
* **Object**: Student\_\_c
* **Formula**:

Date\_of\_Birth\_\_c >= TODAY() - 5844

* **Error Message**: "Student must be at least 16 years old to register"
* **Error Location**: Date\_of\_Birth\_\_c field

**3. Phone\_Format\_Validation**

* **Rule Name**: Phone\_Format\_Validation
* **Object**: Student\_\_c
* **Formula**:

AND(  
 NOT(ISBLANK(Phone\_\_c)),  
 NOT(REGEX(Phone\_\_c, "^\(?\d{3}\)?[-.\s]?\d{3}[-.\s]?\d{4}$"))  
)

* **Error Message**: "Phone number must be in format (XXX) XXX-XXXX"
* **Error Location**: Phone\_\_c field

**Course\_\_c Validation Rules**

**4. Course\_Date\_Validation**

* **Rule Name**: Course\_Date\_Validation
* **Object**: Course\_\_c
* **Formula**:

End\_Date\_\_c <= Start\_Date\_\_c

* **Error Message**: "End date must be after start date"
* **Error Location**: End\_Date\_\_c field

**5. Course\_Capacity\_Validation**

* **Rule Name**: Course\_Capacity\_Validation
* **Object**: Course\_\_c
* **Formula**:

Max\_Capacity\_\_c <= 0

* **Error Message**: "Maximum capacity must be greater than 0"
* **Error Location**: Max\_Capacity\_\_c field

**Application\_\_c Validation Rules**

**6. GPA\_Range\_Validation**

* **Rule Name**: GPA\_Range\_Validation
* **Object**: Application\_\_c
* **Formula**:

AND(  
 NOT(ISBLANK(Previous\_GPA\_\_c)),  
 OR(Previous\_GPA\_\_c < 0, Previous\_GPA\_\_c > 4.0)  
)

* **Error Message**: "GPA must be between 0.0 and 4.0"
* **Error Location**: Previous\_GPA\_\_c field

**Workflow Rules**

**1. Student Application Status Update**

* **Rule Name**: Student\_Application\_Status\_Update
* **Object**: Application\_\_c
* **Criteria**: Application record created OR Review\_Status\_\_c field changed
* **Actions**:
  + **Field Update**: Update Student\_\_c.Application\_Status\_\_c based on Application\_\_c.Review\_Status\_\_c
  + **Email Alert**: Send confirmation email to student

**2. Course Enrollment Capacity Check**

* **Rule Name**: Course\_Enrollment\_Capacity\_Check
* **Object**: Enrollment\_\_c
* **Criteria**: Enrollment record created with status "Registered"
* **Actions**:
  + **Field Update**: Increment Course\_\_c.Current\_Enrollment\_\_c by 1
  + **Field Update**: If Current\_Enrollment\_\_c >= Max\_Capacity\_\_c, set Course\_\_c.Status\_\_c to "Full"

**Process Builder Flows**

**1. Student Registration Process**

* **Process Name**: Student Registration Process
* **Object**: Student\_\_c
* **Trigger**: When a record is created or edited
* **Criteria**:
  + Node 1: Application\_Status\_\_c equals "Submitted"
  + Node 2: Application\_Status\_\_c equals "Approved"

**Actions for Node 1 (Submitted):**

* Create Application\_\_c record
* Send email alert to admissions team
* Create task for document verification

**Actions for Node 2 (Approved):**

* Send welcome email to student
* Create user account for student portal
* Update student record with enrollment date

**2. Course Enrollment Automation**

* **Process Name**: Course Enrollment Automation
* **Object**: Enrollment\_\_c
* **Trigger**: When a record is created or edited
* **Criteria**:
  + Node 1: Enrollment\_Status\_\_c equals "Registered"
  + Node 2: Enrollment\_Status\_\_c equals "Dropped"

**Actions for Node 1 (Registered):**

* Update Course current enrollment count
* Send enrollment confirmation email
* Create calendar event for class schedule

**Actions for Node 2 (Dropped):**

* Decrease Course current enrollment count
* Send drop confirmation email
* Update course status if below capacity

**Approval Processes**

**1. Application Review Approval Process**

* **Process Name**: Application Review Process
* **Object**: Application\_\_c
* **Entry Criteria**: Review\_Status\_\_c equals "Submitted" AND Application\_Fee\_Paid\_\_c equals TRUE

**Approval Steps:**

1. **Step 1**: Department Review
   * **Assigned To**: Department Head (based on Intended\_Major\_\_c)
   * **Criteria**: All applications
   * **Actions**:
     + Field Update: Review\_Status\_\_c = "Under Review"
     + Task: Review academic credentials
2. **Step 2**: Final Approval
   * **Assigned To**: Admissions Director
   * **Criteria**: Previous\_GPA\_\_c >= 3.0
   * **Actions**:
     + Field Update: Review\_Status\_\_c = "Approved", Decision\_Date\_\_c = TODAY()
     + Email Alert: Send acceptance letter

**Final Rejection Actions:**

* Field Update: Review\_Status\_\_c = "Rejected", Decision\_Date\_\_c = TODAY()
* Email Alert: Send rejection notification

**Final Approval Actions:**

* Field Update: Review\_Status\_\_c = "Approved"
* Email Alert: Send acceptance notification with next steps
* Task: Schedule orientation session

**2. Course Registration Approval (for Graduate Courses)**

* **Process Name**: Graduate Course Registration
* **Object**: Enrollment\_\_c
* **Entry Criteria**: Course\_\_c.Course\_Code\_\_c starts with "GRAD" AND Student\_\_c.Record\_Type = "Graduate Student"

**Approval Steps:**

1. **Step 1**: Academic Advisor Approval
   * **Assigned To**: Student's Academic Advisor
   * **Actions**: Review prerequisite requirements
2. **Step 2**: Department Approval
   * **Assigned To**: Department Head
   * **Actions**: Final approval for enrollment

**Flow Builder Configurations**

**1. Student Onboarding Flow (Screen Flow)**

* **Flow Name**: Student\_Onboarding\_Flow
* **Type**: Screen Flow
* **Purpose**: Guide new students through registration process

**Flow Elements:**

1. **Screen 1**: Welcome & Information Collection
   * Input: Personal Information (Name, Email, Phone, DOB)
   * Input: Academic Background
   * Input: Program Interest
2. **Screen 2**: Document Upload Instructions
   * Display: Required documents list
   * Input: Confirmation checkboxes
3. **Screen 3**: Application Fee Payment
   * Display: Fee amount
   * Input: Payment method selection
   * Integration: Payment gateway (future enhancement)
4. **Record Create**: Create Student\_\_c and Application\_\_c records
5. **Screen 4**: Confirmation & Next Steps
   * Display: Application number
   * Display: Timeline for review process

**2. Course Enrollment Flow (Auto-launched)**

* **Flow Name**: Course\_Enrollment\_Flow
* **Type**: Auto-launched Flow
* **Trigger**: When Enrollment\_\_c record is created

**Flow Logic:**

1. **Decision Element**: Check course capacity
   * If available spots: Proceed with enrollment
   * If full: Add to waitlist
2. **Assignment Elements**:
   * Update course enrollment count
   * Set enrollment status
   * Calculate payment amount
3. **Action Elements**:
   * Send confirmation email
   * Create calendar events
   * Update related records

**3. Application Review Assignment Flow (Scheduled)**

* **Flow Name**: Application\_Review\_Assignment
* **Type**: Scheduled Flow
* **Frequency**: Daily at 9 AM
* **Purpose**: Auto-assign applications to reviewers based on workload

**Flow Logic:**

1. **Get Records**: Retrieve unassigned applications
2. **Loop**: For each application
3. **Decision**: Determine reviewer based on department and current workload
4. **Update Records**: Assign reviewer and send notification

**Email Templates**

**1. Application Confirmation Template**

* **Template Name**: Application\_Confirmation
* **Subject**: Your Application Has Been Received - {{Application\_\_c.Application\_Number\_\_c}}
* **Body**:

Dear {{Student\_\_c.First\_Name\_\_c}},  
  
Thank you for submitting your application to [University Name].   
  
Application Details:  
- Application Number: {{Application\_\_c.Application\_Number\_\_c}}  
- Program: {{Application\_\_c.Intended\_Program\_\_c}}  
- Major: {{Application\_\_c.Intended\_Major\_\_c}}  
- Submission Date: {{Application\_\_c.Application\_Date\_\_c}}  
  
Next Steps:  
1. Document verification (3-5 business days)  
2. Academic review (7-10 business days)   
3. Final decision notification  
  
You can track your application status in the student portal using your application number.  
  
Best regards,  
Admissions Team

**2. Enrollment Confirmation Template**

* **Template Name**: Enrollment\_Confirmation
* **Subject**: Course Enrollment Confirmed - {{Course\_\_c.Course\_Name\_\_c}}
* **Body**:

Dear {{Student\_\_c.First\_Name\_\_c}},  
  
Congratulations! You have been successfully enrolled in:  
  
Course: {{Course\_\_c.Course\_Code\_\_c}} - {{Course\_\_c.Course\_Name\_\_c}}  
Credits: {{Course\_\_c.Credits\_\_c}}  
Semester: {{Course\_\_c.Semester\_\_c}} {{Course\_\_c.Academic\_Year\_\_c}}  
Start Date: {{Course\_\_c.Start\_Date\_\_c}}  
  
Payment Information:  
Amount Due: {{Enrollment\_\_c.Payment\_Amount\_\_c}}  
Due Date: [Payment Due Date]  
  
Please log into the student portal to access your course materials and schedule.  
  
Academic Success Team

**Custom Notifications**

**1. Application Status Change Notification**

* **Recipients**: Student (Application\_\_c.Student\_\_c)
* **Trigger**: Application\_\_c.Review\_Status\_\_c field changes
* **Message**: "Your application status has been updated to: {Review\_Status\_\_c}"

**2. Course Capacity Alert**

* **Recipients**: Academic Administrators
* **Trigger**: Course\_\_c.Current\_Enrollment\_\_c >= (Max\_Capacity\_\_c \* 0.9)
* **Message**: "Course {Course\_Name\_\_c} is approaching capacity ({Current\_Enrollment\_\_c}/{Max\_Capacity\_\_c})"

**Tasks and Activities**

**Automated Task Creation**

**1. Document Verification Tasks**

* **Trigger**: When Application\_\_c is created
* **Assigned To**: Admissions Staff
* **Subject**: Verify documents for Application {{Application\_\_c.Application\_Number\_\_c}}
* **Due Date**: Today + 3 days
* **Priority**: High

**2. Student Follow-up Tasks**

* **Trigger**: When Application\_\_c.Review\_Status\_\_c = "Under Review" for 7 days
* **Assigned To**: Admissions Counselor
* **Subject**: Follow up on pending application review
* **Due Date**: Today + 1 day

**3. Orientation Scheduling Tasks**

* **Trigger**: When Application\_\_c.Review\_Status\_\_c = "Approved"
* **Assigned To**: Student Services
* **Subject**: Schedule orientation for new student
* **Due Date**: Today + 5 days