

Phase 4: Process Automation (Admin) – Smart Education Portal

Tools Used: Validation Rules, Roll-Up Summary Fields, Record-Triggered Flow, Before-Save Flow, Approval Process, Reports & Dashboards

1. Validation Rules (Data Quality)

Purpose: Prevent incorrect or incomplete data during student admissions.

Object	Rule Name	Formula	Error Message
Course_Enrollment__c	ValidEnrollmentDates	Enrollment_Start__c < TODAY()	Enrollment start date cannot be in the past.
Payment__c	NonNegativeAmount	Payment_Amount__c <= 0	Payment amount must be greater than zero.

SETUP > OBJECT MANAGER

Course Enrollment

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Object Access

Triggers

Validation Rules

1 Items, Sorted by Rule Name

RULE NAME

ERROR LOCATION

ERROR MESSAGE

ACTIVE

MODIFIED BY

ValidEnrollmentDates

Top of Page

Enrollment start date cannot be in the past.

✓

Sai Sri Satti, 9/24/2025, 3:19 AM

New

SETUP > OBJECT MANAGER

Payment

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Object Access

Triggers

Validation Rules

1 Items, Sorted by Rule Name

RULE NAME

ERROR LOCATION

ERROR MESSAGE

ACTIVE

MODIFIED BY

NonNegativeAmount

Top of Page

Payment amount must be greater than zero.

✓

Sai Sri Satti, 9/24/2025, 3:21 AM

New

2. Roll-Up Summary Fields

Purpose: Automatically calculate key student and course metrics.

Object	Roll-Up Field	Summary Type	Related Object
Student__c	Total_Enrollments__c	COUNT	Course_Enrollment__c
Student__c	Total_Payments__c	SUM	Payment__c

SETUP > OBJECT MANAGER

Student

Details

Fields & Relationships

9 Items, Sorted by Field Label

Quick Find

New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Email	Email__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Student ID	Student_ID__c	Auto Number		
Student Name	Student_Name__c	Text(40)		
Student Name	Name	Text(80)		✓
Total Enrollments	Total_Enrollments__c	Roll-Up Summary (COUNT Course Enrollment)		
Total Payments	Total_Payments__c	Roll-Up Summary (SUM Payment)		

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

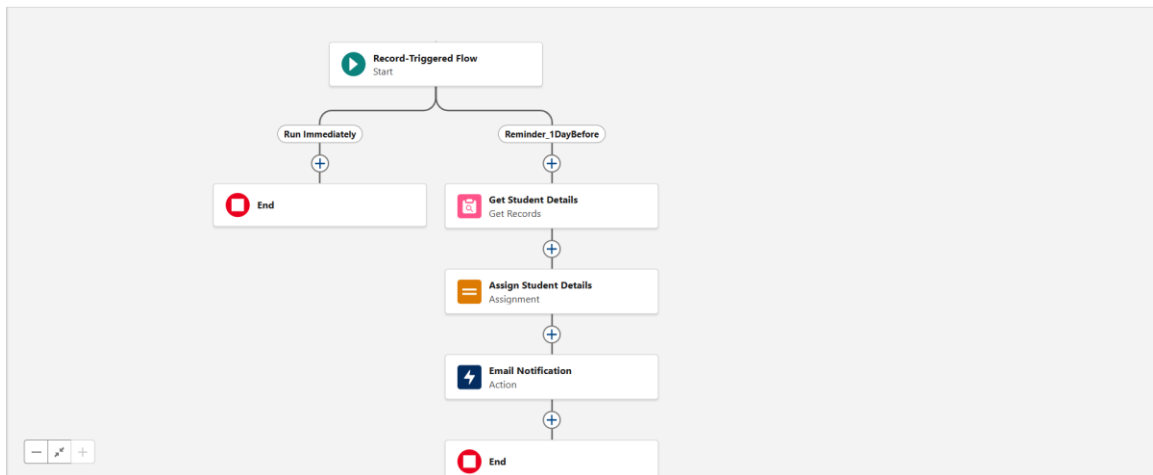
Object Access

Triggers

3. Record-Triggered Flow (Interview & Counseling Reminder)

Purpose: Automatically notify students of scheduled interviews or counseling sessions.

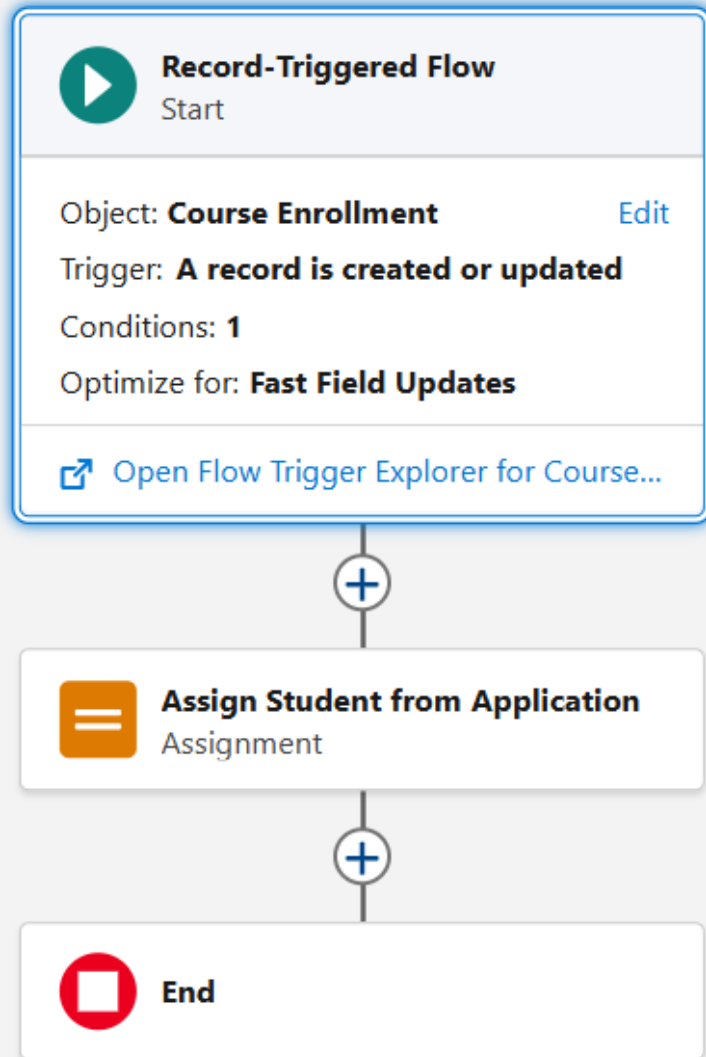
- Object: Counseling_Session__c
- Trigger: When record is created or updated
- Entry Criteria: Status__c = Scheduled
- Scheduled Path: 1 day before Session_Date__c
- Action: Send Email + SMS Reminder



4. Before-Save Flow (Auto-populate Enrollment Data)

Purpose: Auto-fill student field in enrollments based on linked application.

- Object: Course_Enrollment__c
- Trigger: Before Save
- Action: Set Student__c = Application__r.Student__c



5. Approval Process (Scholarship/Loan Request)

Purpose: Ensure proper approval for scholarship/loan applications.

- Object: Payment__c
- Entry Criteria: Scholarship_Request__c = TRUE
- Approver: Finance Officer

- Action Type:
- Approval → Mark Scholarship_Status__c = Approved
- Rejection → Scholarship_Status__c = Rejected

Setup Home Object Manager

Q approval pro

Process Automation

Approval Processes

Didn't find what you're looking for? Try using Global Search.

Approval Processes

Payment: Scholarship Approval Process

Back to Approval Process List

Process Definition Detail

Process Name: Scholarship Approval Process

Unique Name: Scholarship_Approval_Process

Description:

Entry Criteria: Payment: Scholarship Request EQUALS TRUE

Record Editability: Administrator ONLY

Approval Assignment Email Template: Appointment for Unauthenticated User using Appointment Types - For Amazon Chime

Initial Submitters: Student Owner

Created By: Sai Sri Sathu 9/25/2025, 2:50 AM

Modified By: Sai Sri Sathu 9/25/2025, 2:53 AM

Initial Submission Actions

Action Type: Record Lock

Description: Lock the record from being edited

Approval Steps

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
Manager Approval	1				Manager	Final Rejection

6. Reports & Dashboard

Purpose: Provide live insights to admissions officers, faculty, and administrators.

Reports

1. Applications by Program

- Report Type: Applications
- Group by: Program__c
- Filter: Current Academic Year

2. Upcoming Counseling Sessions

- Report Type: Counseling_Session__c
- Filter: Status__c = Scheduled AND Session_Date__c = TODAY()

3. Student Enrollment by Course

- Report Type: Course_Enrollment__c
- Group by: Course__c

Dashboard: Smart Education Snapshot

- Bar Chart: Total Applications per Program (source: Applications by Program)
- Table: Upcoming Counseling Sessions Today
- Number: Total Active Enrollments This Semester
- Pie Chart: Revenue Distribution by Program (source: Payment reports)