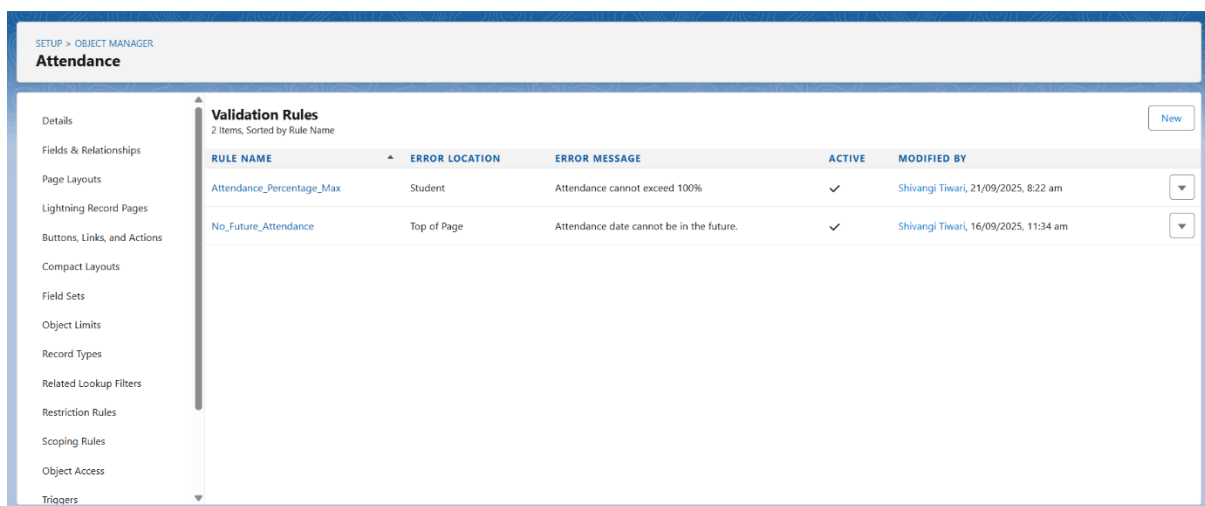


Phase 4: Process Automation (Admin)

1. Validation Rules

- Created validation rules to enforce data accuracy:
 - **Attendance Validation** → Attendance % cannot be greater than 100 or less than 0.
 - **No Future attendance** → Attendance date cannot be in the future
 - **Score Validation** → Score must be between 0–100.



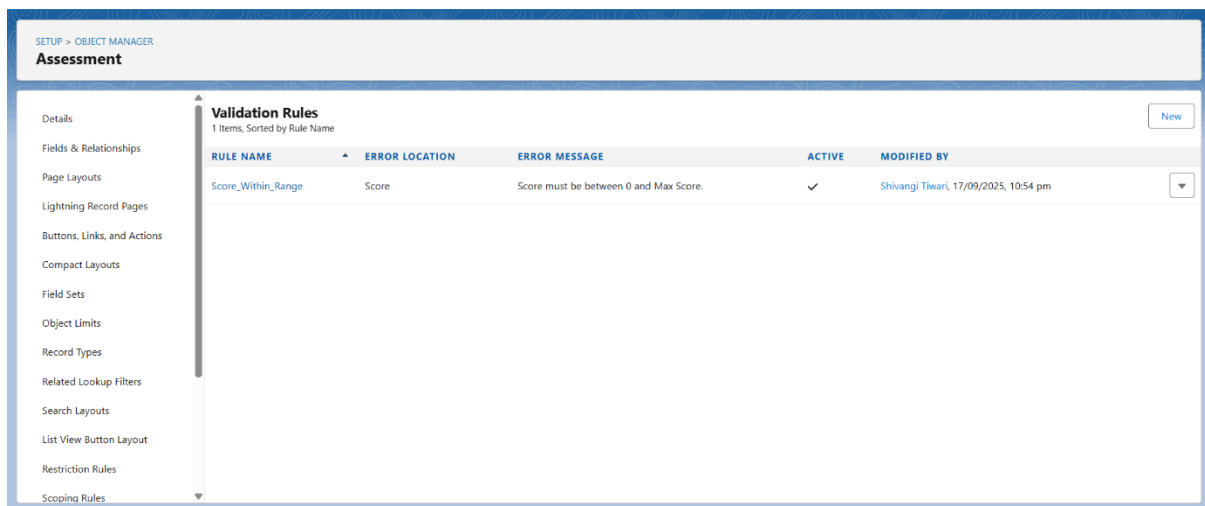
SETUP > OBJECT MANAGER
Attendance

Details

Validation Rules
2 Items, Sorted by Rule Name

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Attendance_Percentage_Max	Student	Attendance cannot exceed 100%	✓	Shivangi Tiwari, 21/09/2025, 8:22 am
No_Future_Attendance	Top of Page	Attendance date cannot be in the future.	✓	Shivangi Tiwari, 16/09/2025, 11:34 am

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



SETUP > OBJECT MANAGER
Assessment

Details

Validation Rules
1 Items, Sorted by Rule Name

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Score_Within_Range	Score	Score must be between 0 and Max Score.	✓	Shivangi Tiwari, 17/09/2025, 10:54 pm

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

2. Workflow Rules (*Legacy, kept for reference*)

- Learned basics but replaced with Flows (modern Salesforce standard).
- No active workflow rules implemented—Flows used instead

3. Process Builder (*Legacy, kept for reference*)

- Explored Process Builder to understand history.
- Not used actively—Flows are the replacement.

4. Approval Process (Intervention Management):

- Routes new Interventions (Risk Level = High) to Dean for approval.
- **On Approval** → Update Status = *Approved*, notify Counselor, and assign follow-up Task.
- **On Rejection** → Update Status = *Rejected*, notify submitting Counselor.
- Integrated with Auto-Launched Flow for automatic submission.

SETUP

Approval Processes

Approval Processes

Intervention: Intervention_Approval_Process

[Back to Approval Process List](#)

Help for this Page

Process Definition Detail

EditCloneDeactivate


Process Name	Intervention_Approval_Process	Active	✓
Unique Name	Intervention_Approval_Process	Next Automated Approver Determined By	
Description	Approval process for high-risk interventions requiring Dean approval		
Entry Criteria			
Record Editability	Administrator OR Current Approver	Allow Submitters to Recall Approval Requests	✓
Approval Assignment Email Template	Intervention_Submission_Notice		
Initial Submitters	Student Owner, User_Counselor User		
Created By	Shivangi Tiwari	19/09/2025, 12:59 pm	Modified By Shivangi Tiwari 19/09/2025, 7:00 pm

Initial Submission Actions

Add ExistingAdd New


Action	Type	Description
	Record Lock	Lock the record from being edited
Edit Remove	Field Update	Mark Pending Approval
Edit Remove	Email Alert	Intervention_Approval_Notification
Edit Remove	Task	Review Intervention

Approval Steps


Approval Processes


Approval Steps 1

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
Hide Actions Edit	1	Dean_Approval_Intervention		(Student: Risk Level EQUALS High) OR (Intervention: Case Status EQUALS In Progress) , else Reject	User:Dean_User	Final Rejection


Approval Actions

[Add Existing](#)
[Add New](#)

Action	Type	Description
Edit Remove	Email Alert	Email_Approval_Notification
Edit Remove	Field Update	Set_Intervention_Approved


Rejection Actions


[Add Existing](#)
[Add New](#)

Action	Type	Description
Edit Remove	Email Alert	Email_Rejection_Notification
Edit Remove	Field Update	Set_Intervention_Rejected

Final Approval Actions 1

[Add Existing](#)
[Add New](#)

Action	Type	Description
Edit	Record Lock	Lock the record from being edited
Edit Remove	Field Update	Mark as Approved
Edit Remove	Email Alert	Email_Final_Approval_Notification
Edit Remove	Task	Implement Intervention


Approval Processes

[Edit](#) | [Remove](#)

[Edit](#) | [Remove](#)

Final Approval Actions 1

[Add Existing](#)
[Add New](#)

Action	Type	Description
Edit	Record Lock	Lock the record from being edited
Edit Remove	Field Update	Mark as Approved
Edit Remove	Email Alert	Email_Final_Approval_Notification
Edit Remove	Task	Implement Intervention

Final Rejection Actions 1

[Add Existing](#)
[Add New](#)

Action	Type	Description
Edit	Record Lock	Unlock the record for editing
Edit Remove	Field Update	Mark as Rejected
Edit Remove	Task	Revise Intervention
Edit Remove	Email Alert	Email_Final_Rejection_Notification

Recall Actions 1

[Add Existing](#)
[Add New](#)

Action	Type	Description
	Record Lock	Unlock the record for editing

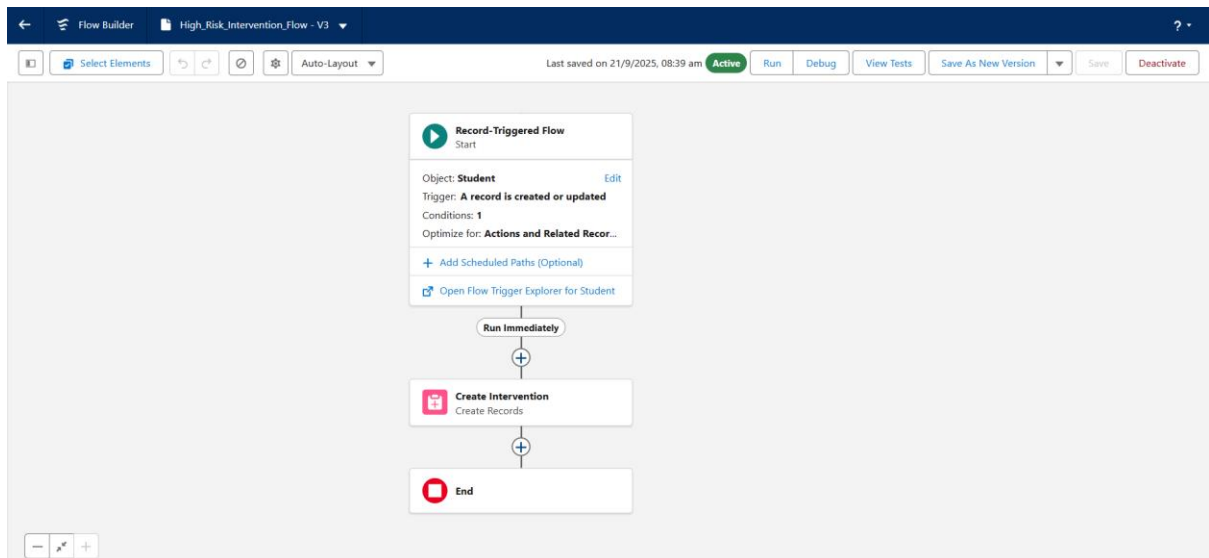
[Back To Top](#)

Always show me [more](#) records per related list

5. Flows

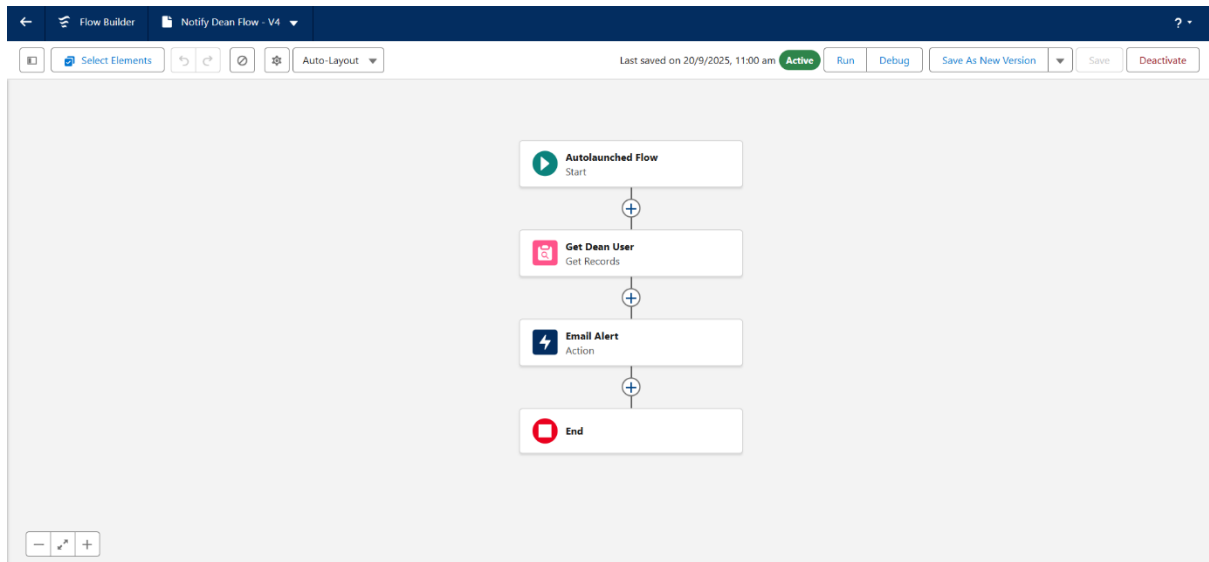
Built multiple Flows to automate institutional processes:

- Record-Triggered Flow (Student Risk Management):**
 - If Attendance_Percent__c < 75% OR Average_Score__c < 40%, system updates Risk_Level__c = High.
 - Auto-creates an Intervention record for Counselor follow-up.



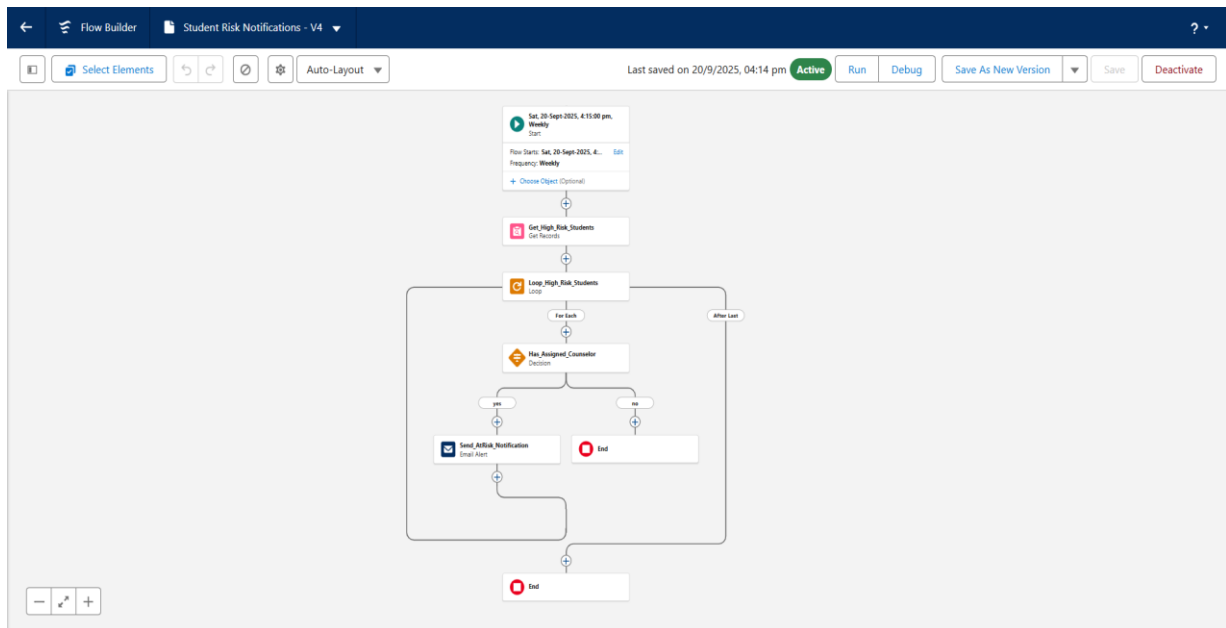
- **Auto-Launched Flow with Approval:**

- When Intervention is submitted, send custom notification/email to Dean for review.



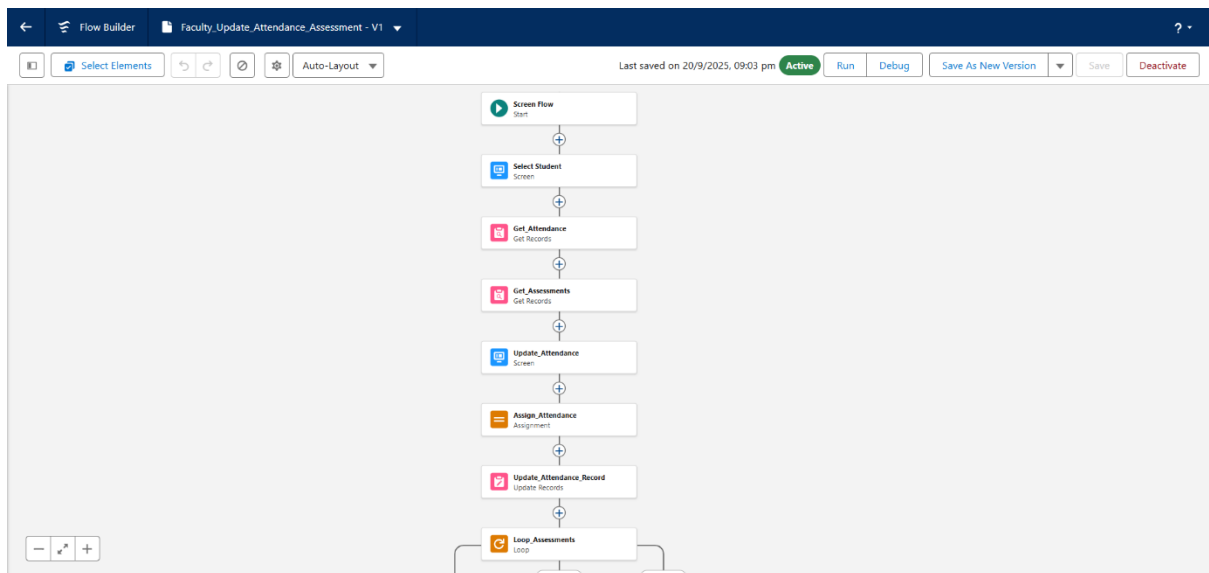
- **Scheduled Flow:**

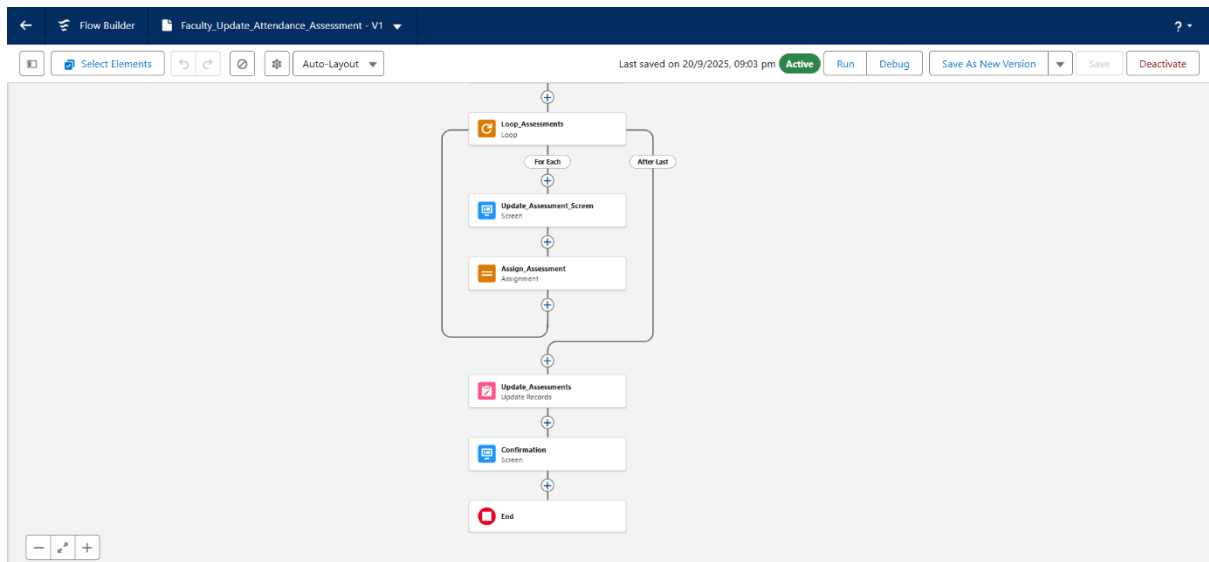
- Weekly sends report to Counselor with a list of students flagged as “High Risk”.



- **Screen Flow (Faculty Update):**

- Faculty can update Attendance and Assessments via guided screen in Lightning App.





6. Email Alerts

- Configured email alerts to send:
 - Notification to Dean when new Intervention is logged.

SETUP Email Alerts

Email Alert: **Email_Submission_Notification**

Rules Using This Email Alert (0) | Approval Processes Using This Email Alert (0) | Entitlement Processes Using This Email Alert (0)

Email Alert Detail [Edit] [Delete] [Clone]

Description	Email_Submission_Notification	Email Template	Email_Approval_Notification
Unique Name	Email_Submission_Notification	Object	Intervention
From Email Address	Default Workflow User's email address		
Recipients	User: Dean User		
Additional Emails			
Created By	Shivangi Tiwari, 20/09/2025, 10:24 am	Modified By	Shivangi Tiwari, 20/09/2025, 10:35 am

[Edit] [Delete] [Clone]

- Email to Counselor when a Student is flagged as “High Risk”.

SETUP Email Alerts

Email Alert: **AtRisk Notification Email**

Rules Using This Email Alert (0) | Approval Processes Using This Email Alert (0) | Entitlement Processes Using This Email Alert (0)

Email Alert Detail [Edit] [Delete] [Clone]

Description	AtRisk Notification Email	Email Template	AtRisk_Student_Report
Unique Name	AtRisk_Notification_Email	Object	Student
From Email Address	Default Workflow User's email address		
Recipients	Related User: Assigned Counselor		
Additional Emails			
Created By	Shivangi Tiwari, 20/09/2025, 3:39 pm	Modified By	Shivangi Tiwari, 20/09/2025, 3:39 pm

[Edit] [Delete] [Clone]

- Email to Faculty whenever low attendance falls .

SETUP
Email Alerts

Email Alert
Notify Faculty - Low Attendance

[Rules Using This Email Alert \(1\)](#) | [Approval Processes Using This Email Alert \(0\)](#) | [Entitlement Processes Using This Email Alert \(0\)](#)

[Help for this Page](#)

Email Alert Detail [Edit](#) [Delete](#) [Clone](#)

Description	Notify Faculty - Low Attendance	Email Template	Student Attendance Alert
Unique Name	Notify_Faculty_Low_Attendance	Object	Student
From Email Address	Default Workflow User's email address		
Recipients	Related User: Assigned Faculty		
Additional Emails			
Created By	Shivangi Tiwari , 20/09/2025, 10:30 pm	Modified By	Shivangi Tiwari , 20/09/2025, 10:33 pm

[Edit](#) [Delete](#) [Clone](#)

7. Field Updates

- Automated field updates via Flows:
 - Auto-populated Risk_Level__c when attendance or score falls below threshold.

SETUP
Field Updates

Field Update
At Risk Status Update

[Rules Using This Field Update \(1\)](#) | [Approval Processes Using This Field Update \(0\)](#) | [Entitlement Processes Using This Field Update \(0\)](#)

[Help for this Page](#)

Field Update Detail [Edit](#) [Delete](#)

Name	At Risk Status Update
Unique Name	At_Risk_Status_Update
Description	
Object	Student
Field to Update	Student: Risk Level
Field Data Type	Picklist
Re-evaluate Workflow Rules after Field Change	<input type="checkbox"/>
New Field Value	High

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

Rules Using This Field Update [Rules Using This Field Update Help](#)

Action	Rule Name	Description	Object	Active
Edit Del Deactivate	AtRisk Status.Update		Student	✓

- Set default Intervention status = “Open” when record is created.

Field Updates

Field Update

Intervention Status

[Rules Using This Field Update \(1\)](#) |
 [Approval Processes Using This Field Update \(0\)](#) |
 [Entitlement Processes Using This Field Update \(0\)](#)

Field Update Detail

Name

Intervention Status

Edit

Delete

Unique Name

Intervention_Status

Description

Object

Intervention

Field to Update

Intervention: Case Status

Field Data Type

Picklist

Re-evaluate Workflow Rules after Field Change

☐

New Field Value

In Progress

Edit

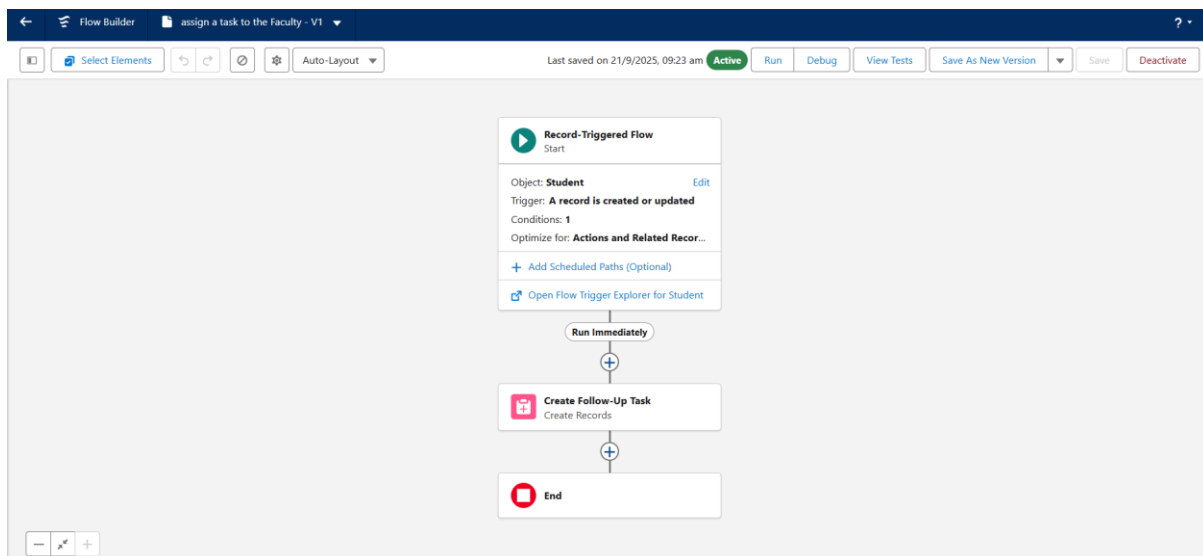
Delete

Rules Using This Field Update

Action	Rule Name	Description	Object	Active
Edit Del Activate	Intervention_Status		Intervention	<input type="checkbox"/>

8. Tasks

- Automated task creation:
 - When a Student is flagged as “High Risk”, a **Task** is assigned to the relevant Faculty with subject “Follow Up with Student” and due date +3 days.



9. Custom Notifications

- Created **Custom Notification Type** → **Intervention Alert**.
- Configured Flow to send a **real-time notification to Dean** when new Intervention is submitted.
- Notification includes Student name and links directly to the record.

