

Phase 4: Process Automation

4.1 Validation Rules

4.1.1 Backlog_clearance_plan:

$\text{AND}(\text{RecordType.DeveloperName} = \text{"Academic_Success_Plan"}, \text{Student_r.Backlogs_c} = 0)$

The screenshot shows the 'Information' form for a Success Plan. The form includes the following fields:

- Success Plan Number
- * Student: Reddy Veera
- Subject For Clearance: MC
- Remedial Class Scheduled: ☐
- Status: On Hold
- Due Date:

A red error message box is displayed over the form, stating: "We hit a snag. Review the errors on this page. You cannot create a success plan for students with 0 backlogs".

4.1.2 Graduation_Date:

$(\text{YEAR}(\text{Expected_Graduation_Date_c}) - (\text{YEAR}(\text{Enrolled_Date_c}))) < 4$

The screenshot shows the 'Student' form. The form includes the following fields:

- * Student ID: AXd66
- Admission Type: Management Quota
- Engagement Points:
- * Enrolled Date: 9/3/2025
- * Expected Graduation Date: 9/19/2025
- * Attendance Percentage: 56.00%
- * Overall CGPA: 7.00
- * Backlogs: 5

A red error message box is displayed over the form, stating: "We hit a snag. Review the errors on this page. You didnt complete your 4 years tenure in the college please enter correct graduation year".

4.1.3 Interaction_Date_Validation

Interaction_Date__c > TODAY()

The screenshot shows a 'New Support Interaction: Academic Support' form. The form includes fields for 'Student' (Reddy Veera), 'Interaction Date' (9/27/2025), 'Academic Support', and 'Current Subject'. A red error message box is displayed over the form, stating 'We hit a snag.' and 'Review the errors on this page.' with a bullet point: 'The logged interactions shouldn't have a future date'. The form has 'Cancel', 'Save & New', and 'Save' buttons at the bottom.

4.1.4 Student_ID_Format

NOT(REGEX(Student_ID__c ,"AX[d-x][0-9]{2}"))

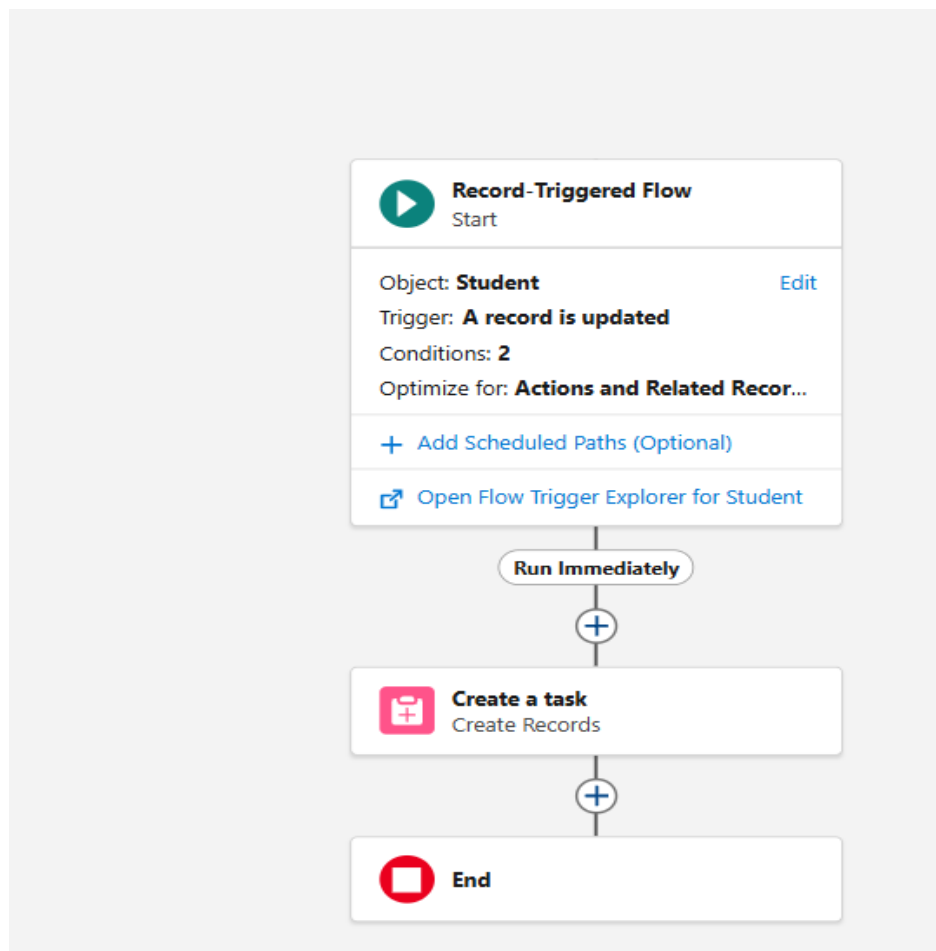
The screenshot shows a student profile form. The form includes fields for 'Student ID' (AXz901), 'Admission Type' (Entrance Exam), 'Engagement Points', 'Enrolled Date' (9/17/2025), 'Expected Graduation Date' (9/18/2029), 'Email', 'Attendance Percentage' (99.00%), 'Overall CGPA' (6.00), and 'Backlogs' (4). A red error message box is displayed over the form, stating 'We hit a snag.' and 'Review the errors on this page.' with a bullet point: 'The Student ID must start with college code(AX) then your branch code then your roll number'. The form has 'Cancel', 'Save & New', and 'Save' buttons at the bottom.

4.2 Flow Builder


4.2.1 Record Triggered Flow

When a student's Current Backlogs and is now greater than zero, we will automatically create a **Task** for the student's Mentor.

1. **Trigger:** The flow starts automatically when a Student (Contact) record is updated.
2. **Conditions:** It runs only if the Current Backlogs / Arrears field has changed and is now greater than 0.
3. **Data Check:** A decision element first verifies that the student is linked to an Account to prevent errors.
4. **Action:** The flow's main action is to create one new Task record.
5. **Field Mapping:** It dynamically populates the Task's Subject, sets the Due Date to today, and links it to the Student.
6. **Task Assignment:** The new task is automatically assigned to the owner of the student's parent Account ie Mentor.



Task Notification:

 Task

Proactive Outreach: Student has new backlogs

✓ Completed

Edit Comments

Change Date

Create Follow-Up Task

Name


Related To

[Sreelekha yeldandi](#)

Details

Related

Assigned To

 [Sreeja Nayani](#)

Subject

Proactive Outreach: Student has new backlogs


Due Date

9/28/2025

Priority

Normal

Created By

 [Sreenidhi Muthyala](#), 9/28/2025, 11:11 AM

Status


Completed

Name

[Sreelekha yeldandi](#)

Related To

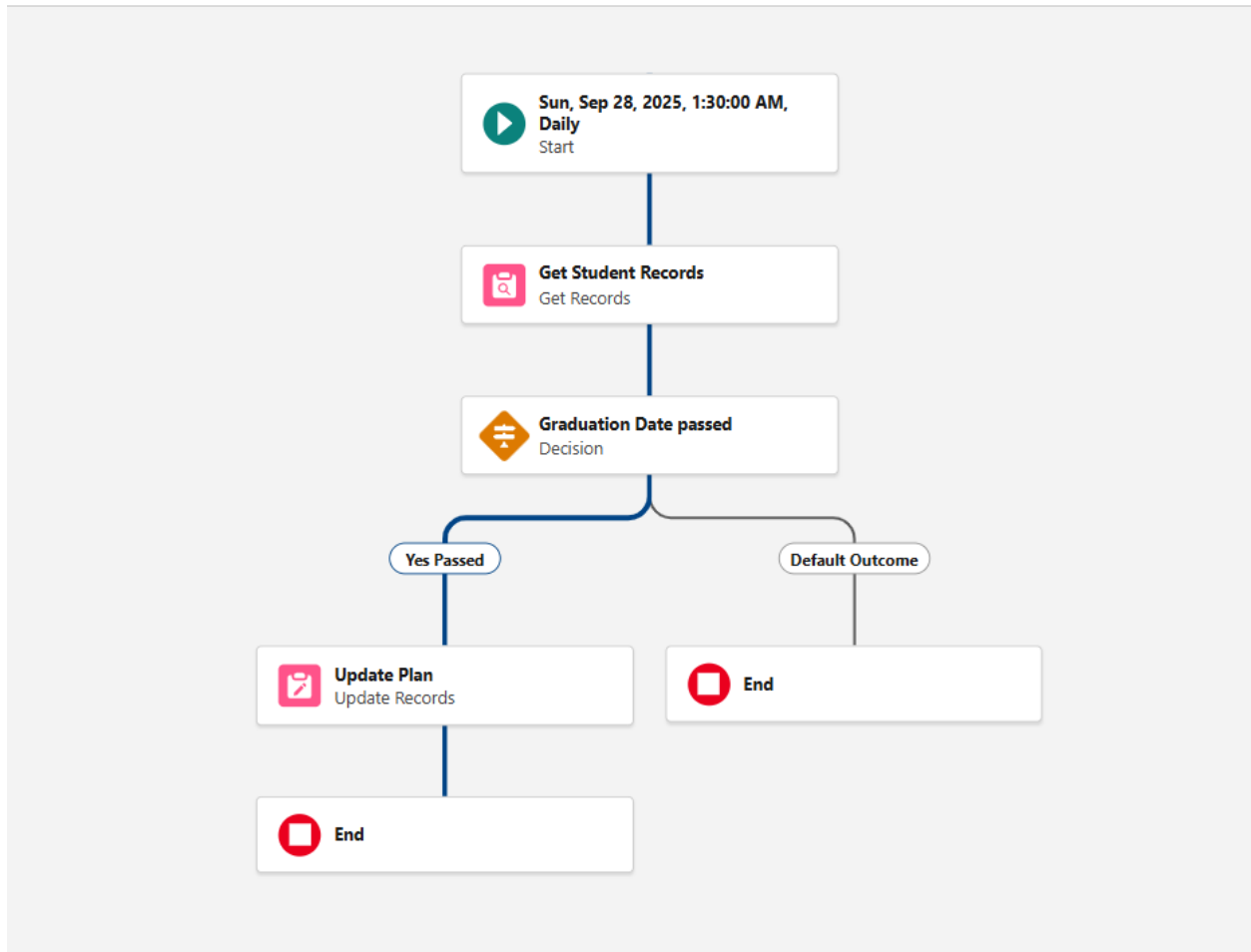
Last Modified By

 [Sreenidhi Muthyala](#), 9/28/2025, 7:03 PM

4.2.2 Scheduled Flow

It runs automatically every single night. It will scan all Success Plans in the system and automatically close out any plans that are no longer relevant.

1. **Schedule:** The flow is scheduled to run every night at 1:30 AM.
2. **Find Records:** The flow will find all Success Plan records that meet two conditions:
 - Their Status is "Active."
 - The Student they are related to has an Expected Graduation Date that is in the past (e.g., a date before today).
3. **Update Records:** For every plan it finds, the flow will update two fields:
 - Change the Status to "Completed."
 - Set the Plan Outcome to "Successful" (as the student has graduated).
 - Optionally, it could update the Outcome Summary with a note like "Automatically closed upon student graduation."



4.3 Approval Process

1. **Entry Criteria:** The process should only start for Success Plan records that are a "Backlog Clearance" plan and have been submitted for approval.
2. **Initial Submission:** When the Mentor is ready, they will click a "Submit for Approval" button. This will lock the record, preventing any further edits.
3. **Step 1 - Manager Approval:** The request will first go to the Mentor's direct manager i.e Dean. The manager can approve or reject it.
4. **Final Approval:** If the manager approves, the plan's status is automatically changed to "Active."

5. **Final Rejection:** If the manager rejects, the plan's status is changed back to "Draft," and the record is unlocked so the Mentor can make changes and resubmit.

Success Plan
SP-0007

New OpportunityEditNew Case

RelatedDetails

Approval History (2)

ApproveReject

Step Name	Date	Status	Assigned To
Step 1	9/27/2025, 6:42 PM	Pending	Sreenidhi Muthyala
Approval Request Submitt...	9/27/2025, 6:42 PM	Submitted	Sreeja Nayani

View All

Activity

We couldn't find the record you're trying to access. It may have been deleted by another user, or there may have been a system error. Ask your administrator for help.

Approval Request
Success Plan Approval Pending

ApproveRejectReassign

Submitter
Sreeja Nayani

Date Submitted
Sep 27, 2025

Actual Approver
Sreenidhi Muthyala

Assigned To
Sreenidhi Muthyala

Details

Approval Details

Success Plan Number
[SP-0007](#)

Subject For Clearance
PA

Submitter Comments

Sreeja Nayani

Please review and approve

Sep 27, 2025, 6:42:39 PM

Customized email alert:

Approval Request Spam



Sreeja Nayani via 9kyho9b5zbh3.gl-bx8kpua1.can98.bnc.salesforce.com
to me

Sat, Sep 27, 6:42 PM (1 day ago)



Why is this message in spam? This message is similar to messages that were identified as spam in the past.

Report not spam



Sreeja Nayani has requested your approval for the following item: <https://orgfarm-c3ab9f2e96-dev-ed.develop.my.salesforce.com/p/process/ProcessInstanceWorkitemWizardStageManager?id=04igL000000PmHZ>

Please click this link to approve or reject this record.

Thank you,
Salesforce