

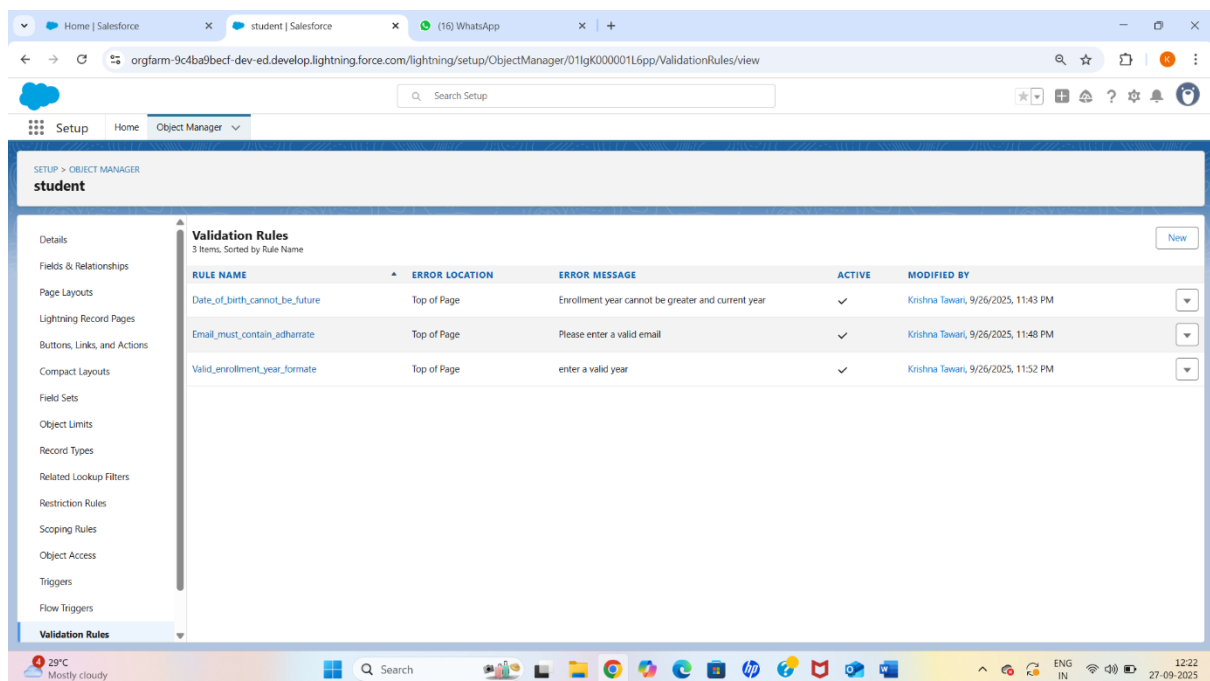
Phase 4: Process Automation (Admin)

Goal: The goal of this phase is to automate repetitive administrative tasks in the **Student Management System**. Using Salesforce automation tools, we ensure student records are accurate, status updates are automatic, reminders are sent on time, and approval requests are streamlined without manual effort.

1. Validation Rules

Object: Student__c

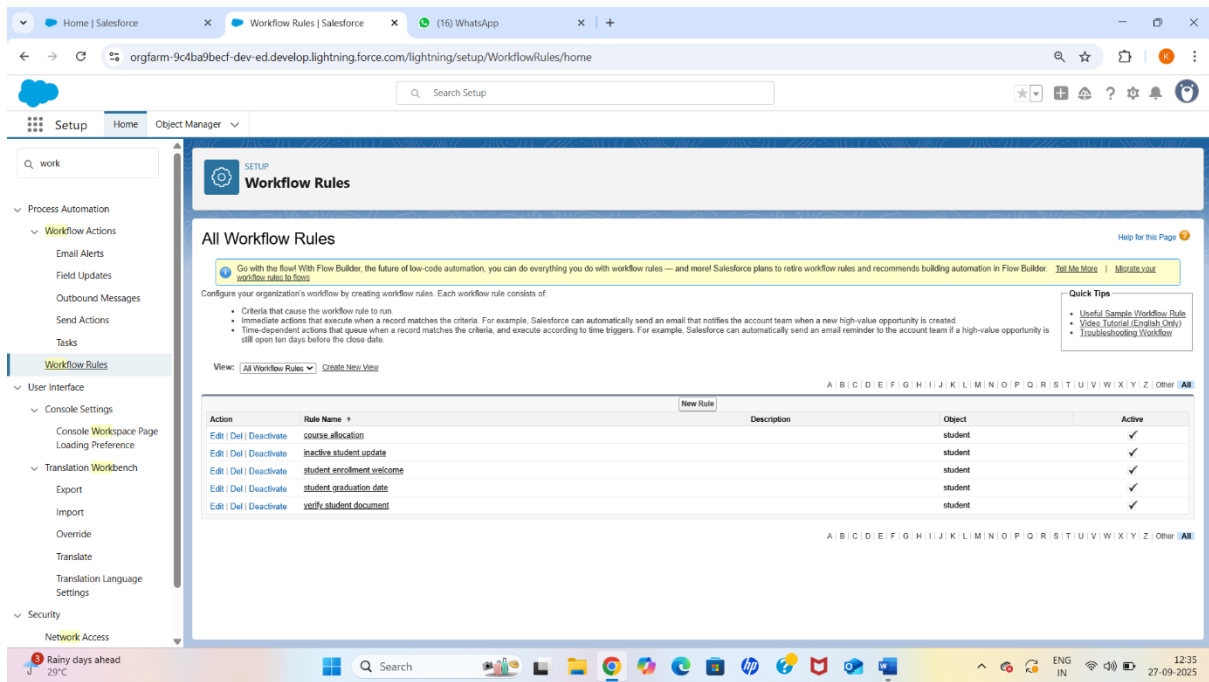
- **Rule:** Ensure Enrollment Year is not in the future.
- **Condition:** Enrollment_Year__c > YEAR(TODAY())
- **Error Message:** "Enrollment Year cannot be greater than the current year."



2. Workflow Rules

Object: Student__c

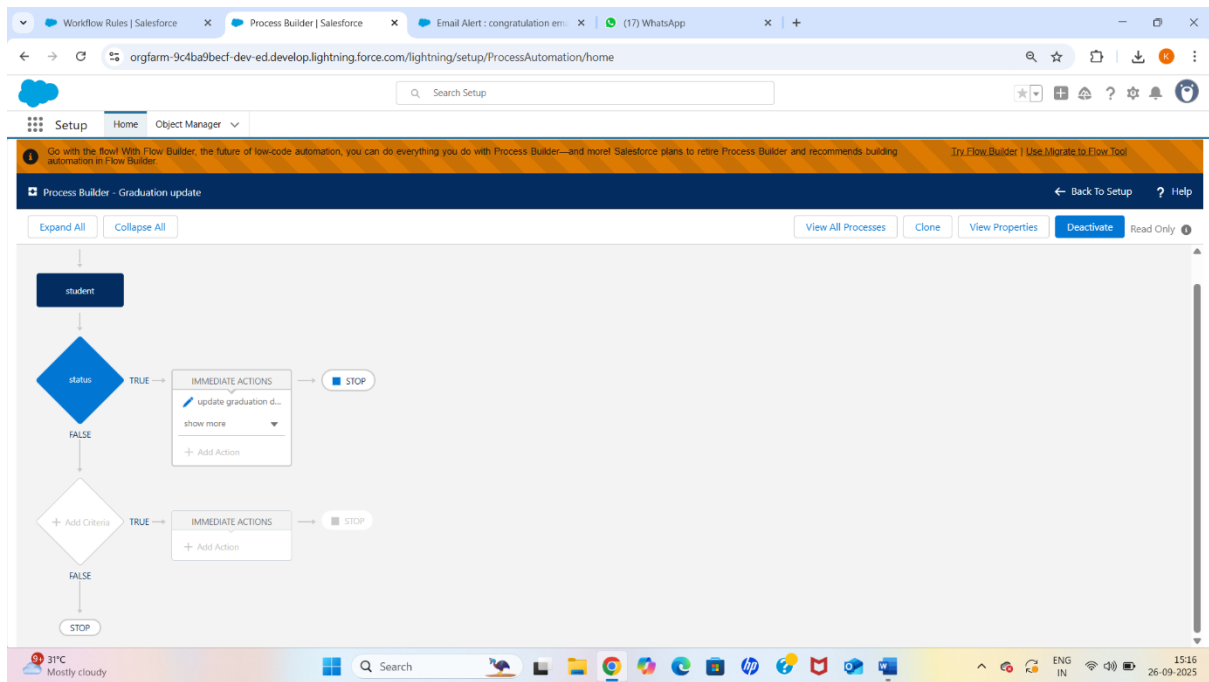
- **Rule Name:** Inactive Student Update
- **Criteria:** Enrollment_Year__c < TEXT(YEAR(TODAY()))
- **Action:** Field Update → Status__c = "Inactive"



3. Process Builder

Object: Student__c

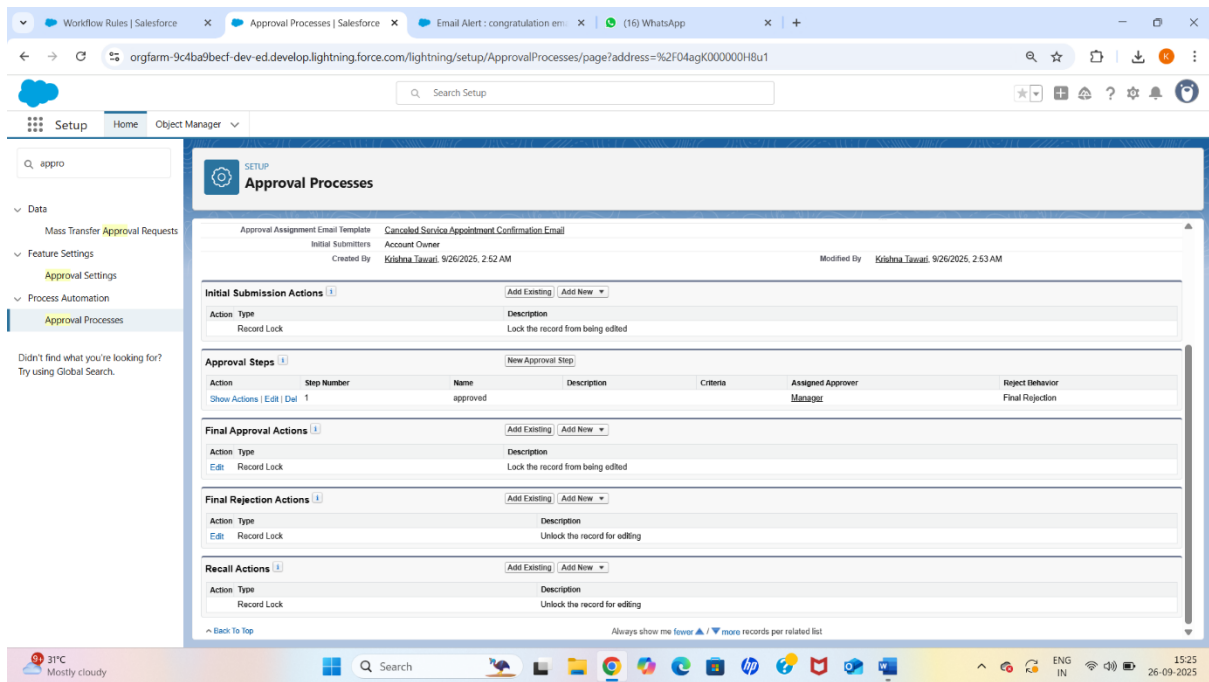
- **Process Name:** Graduation Update
- **Criteria:** When Status__c = "Graduated"
- **Action 1:** Update Field → Graduation_Date__c = TODAY()
- **Action 2:** Send Email Alert → “Graduation Congratulations Email” to student.



4. Approval Process

Object: Student__c

- **Process Name:** Scholarship Approval
- **Entry Criteria:** Scholarship_Requested__c = TRUE
- **Steps:**
 1. Initial Submission → Lock record.
 2. Assigned To → Finance Staff Queue.
 3. Final Approval → Unlock record + Update Scholarship_Status__c = "Approved".
 4. Rejection → Update Scholarship_Status__c = "Rejected".



5. Flow Builder

a) Screen Flow: Student Registration

- **Inputs:** First Name, Last Name, Email, Enrollment Year, Status.
- **Action:** Create Student record in Student__c.

b) Record-Triggered Flow: Auto Assign Status

- **When:** A new Student record is created.
- **Condition:** If Enrollment_Year__c = TEXT(YEAR(TODAY()))
- **Action:** Update Status__c = "Enrolled".

c) Scheduled Flow: Semester Reminder

- **When:** Every semester start date (Scheduled path).
- **Action:** Send Email Alert to all Student__c records with Status__c = "Enrolled".

Workflow Rules | Salesforce | Flows | Salesforce | student registration screen flow | Email Alert: congratulation em... | (16) WhatsApp

orgfarm-9c4ba9becf-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowBuilder.app?flowId=301gK00000Lm9zCQAR

Flow Builder | student registration screen flow - V1

Last saved on 9/26/2025, 03:42 PM Inactive Run Debug Save As New Version Save Activate

Toolbox

Elements Manager

- Interaction (3)
 - Screen
 - Action
 - Subflow
- Logic (6)
 - Assignment
 - Decision
 - Loop
 - Transform
 - Collection Sort
 - Collection Filter
- Data (5)
 - Create Records
 - Update Records
 - Get Records
 - Delete Records
 - Roll Back Records

Start Screen Flow

The flow starts when a user or app launches the flow.

Screen student registration screen

Create Records create student record

Get more on the AppExchange

29°C Mostly cloudy

Search

ENG IN

15:45 26-09-2025

Flows | Salesforce | student enrollm... | student registrati... | Flows | Salesforce | Flows | Salesforce | Loop enrolled st... | Email Alert: com... | (16) WhatsApp

orgfarm-9c4ba9becf-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowBuilder.app?flowId=301gK00000LmWEWQA3

Flow Builder | Loop enrolled student - V1

Your automation was activated.

Last saved on 9/26/2025, 04:17 PM Active Run Debug Save As New Version Save Deactivate

Select Elements

Auto-Layout

Wed, Sep 24, 2025, 12:00:00 AM Daily Start

Flow Starts: Wed, Sep 24, 2025, 1... Edit

Frequency: Daily

+ Choose Object (Optional)

Get enrolled student Get Records

End

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16:17 26-09-2025

6. Email Alerts

Object: Student__c

- Templates Created:**

1. Semester Reminder Email.
2. Graduation Congratulations Email.
3. Scholarship approved

Home | Salesforce

Email Alerts | Salesforce

orgfarm-9c4ba9becf-dev-ed.develop.lightning.force.com/lightning/setup/WorkflowEmails/page?address=%2F01WgK00000091zN

Search Setup

SetupHomeObject Manager

email alert

Process AutomationWorkflow ActionsEmail Alerts

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

SETUP

Email Alerts

Email Alert

Scholarship approved

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

Description

Scholarship approved

Unique Name

Scholarship_approved

From Email Address

Default Workflow User's email address

Recipients

User_chirag.agarwal

Additional Emails

Created By

Krishna.Taxwal, 9/27/2025, 12:36 AM

Modified By

Krishna.Taxwal, 9/27/2025, 5:49 AM

Email Template

scholarship_approval

Object

student

Buttons: Edit, Delete, Clone

Rules Using This Email Alert

Rules Using This Email Alert Help

Table: Rules Using This Email Alert

Approval Processes Using This Email Alert

Approval Processes Using This Email Alert Help

Entitlement Processes Using This Email Alert

Entitlement Processes Using This Email Alert Help

Flows Using This Email Alert

Flows Using This Email Alert Help

25°C Rain

Search

Taskbar icons

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18:20 27-09-2025

Home | Salesforce

Email Alerts | Salesforce

orgfarm-9c4ba9becf-dev-ed.develop.lightning.force.com/lightning/setup/WorkflowEmails/page?address=%2F01WgK000000907F

Search Setup

SetupHomeObject Manager

email alert

Process AutomationWorkflow ActionsEmail Alerts

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

SETUP

Email Alerts

Email Alert

congratulation email

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

Help for this Page

Email Alert Detail

Description

congratulation email

Unique Name

congratulation_email

From Email Address

Default Workflow User's email address

Recipients

User_chirag.agarwal

Additional Emails

Created By

Krishna.Taxwal, 9/26/2025, 2:45 AM

Modified By

Krishna.Taxwal, 9/27/2025, 5:44 AM

Email Template

congratulation_email_for_graduates

Object

student

Buttons: Edit, Delete, Clone

Rules Using This Email Alert

Rules Using This Email Alert Help

Approval Processes Using This Email Alert

Approval Processes Using This Email Alert Help

Entitlement Processes Using This Email Alert

Entitlement Processes Using This Email Alert Help

Flows Using This Email Alert

Flows Using This Email Alert Help

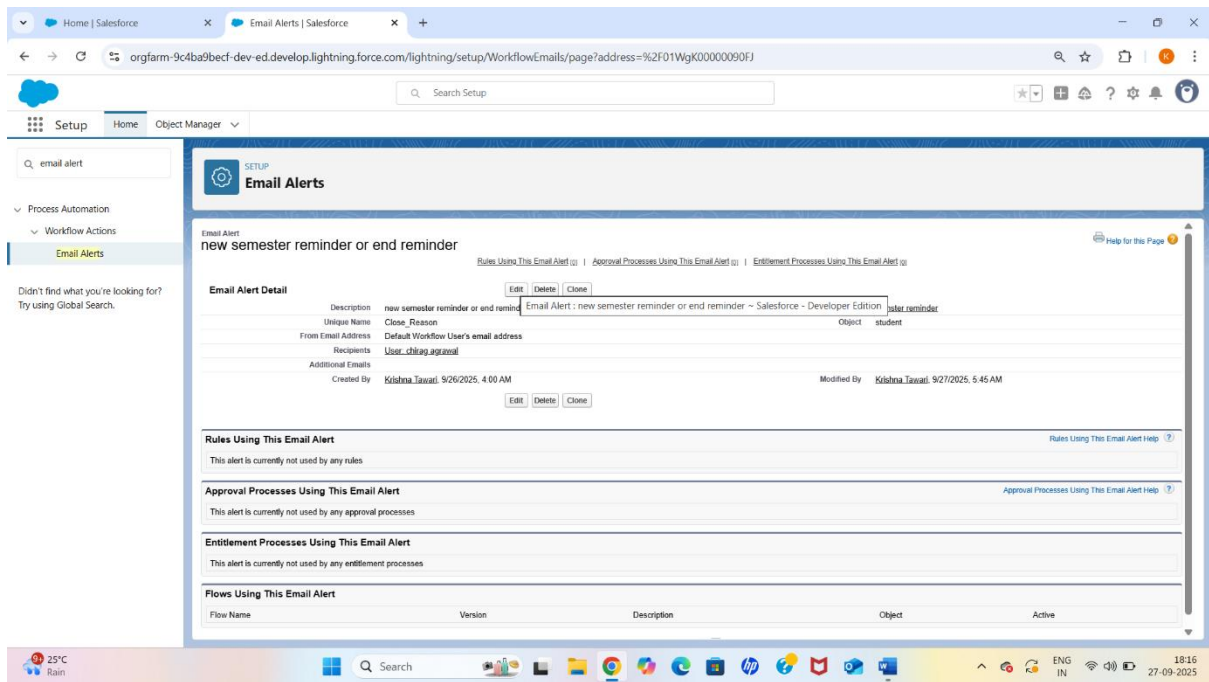
25°C Rain

Search

Taskbar icons

ENG IN

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7. Field Updates

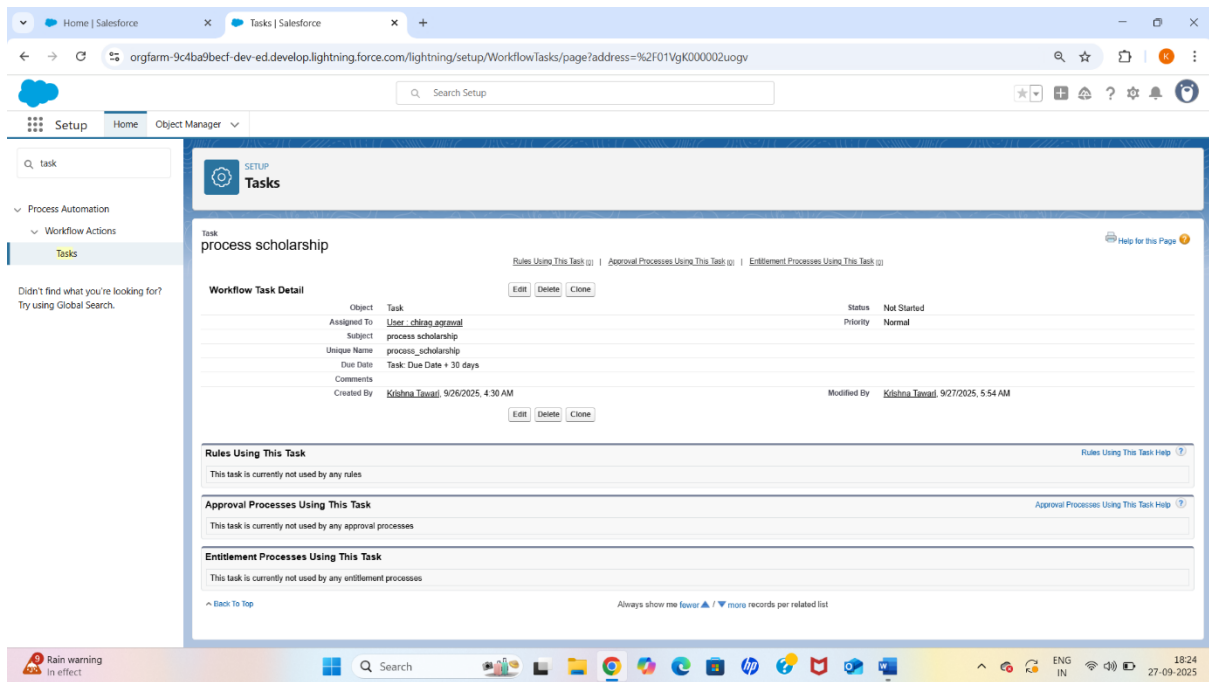
Objects & Fields:

- Student__c.Status__c → "Inactive" (Workflow Rule).
- Student__c.Graduation_Date__c → TODAY() (Process Builder).
- Student__c.Age__c → Formula result (Flow).

8. Tasks

Object: Student__c

- **Example:** When Scholarship request is approved, create a Task for Finance Staff: "Process Scholarship Payment."



9. Custom Notifications

Object: Student__c

- Example:** When a student is marked as “Graduated”, send a **Custom Notification** to the Advisor/Staff to initiate alumni registration.

