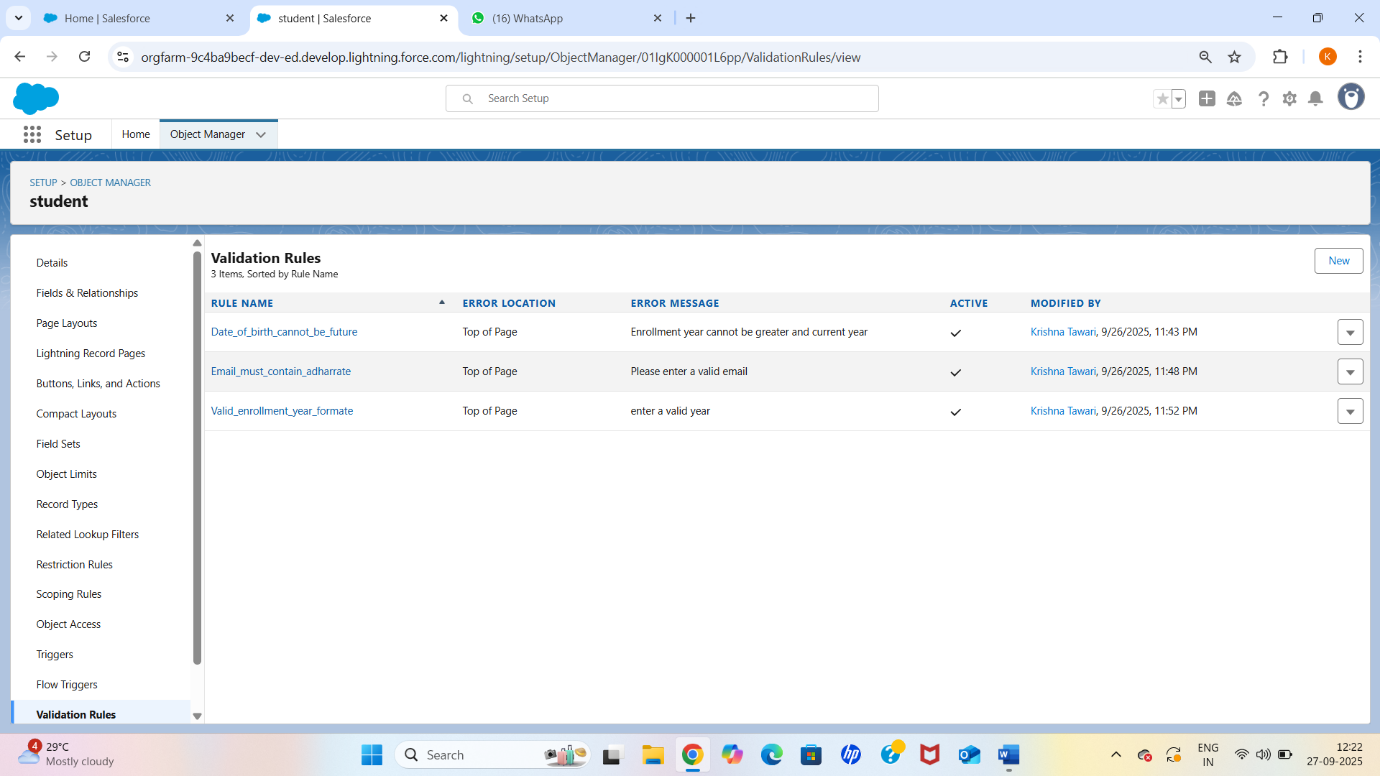
**Phase 4: Process Automation (Admin)**

**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

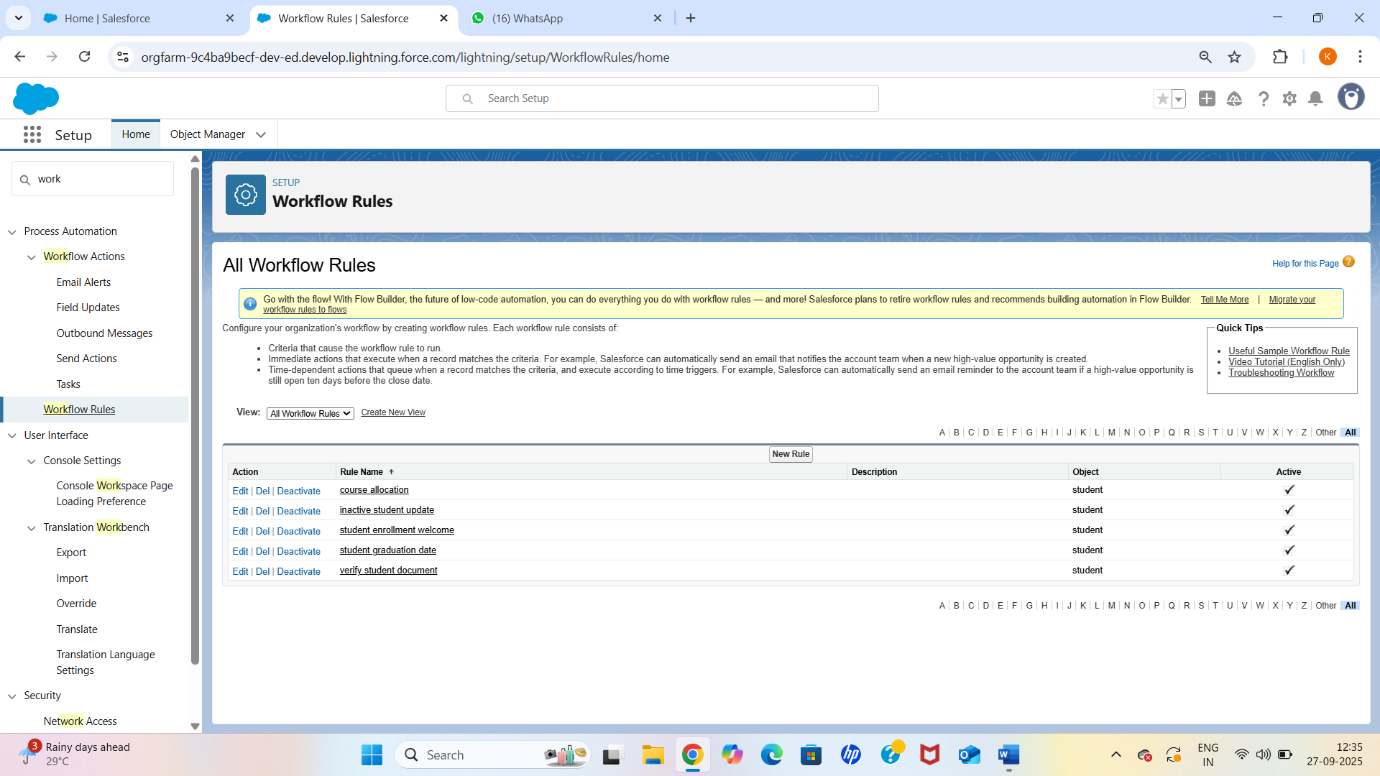
* **Rule:** Ensure Enrollment Year is not in the future.
* **Condition:** Enrollment\_Year\_\_c > YEAR(TODAY())
* **Error Message:** "Enrollment Year cannot be greater than the current year."



**2. Workflow Rules**

**Object:** Student\_\_c

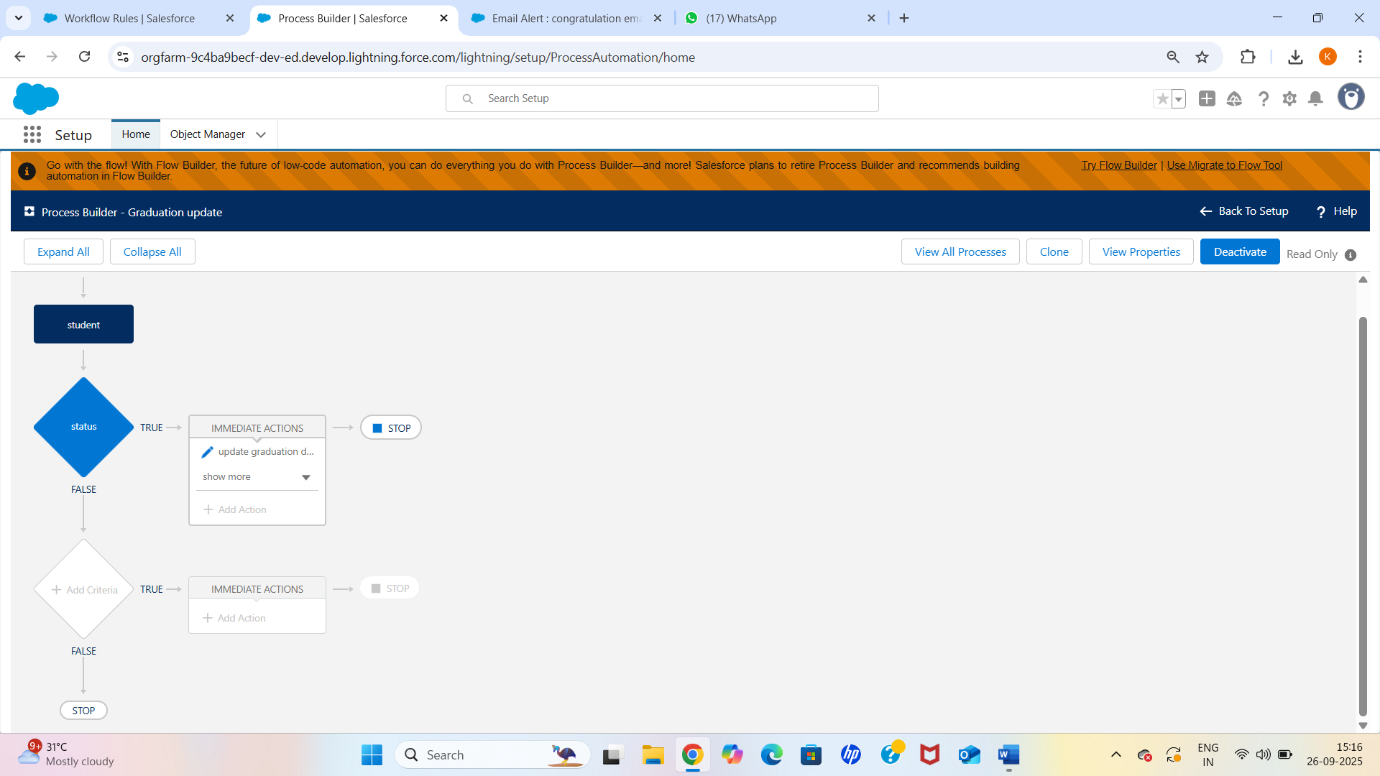
* **Rule Name:** Inactive Student Update
* **Criteria:** Enrollment\_Year\_\_c < TEXT(YEAR(TODAY()))
* **Action:** Field Update → Status\_\_c = "Inactive”



**3. Process Builder**

**Object:** Student\_\_c

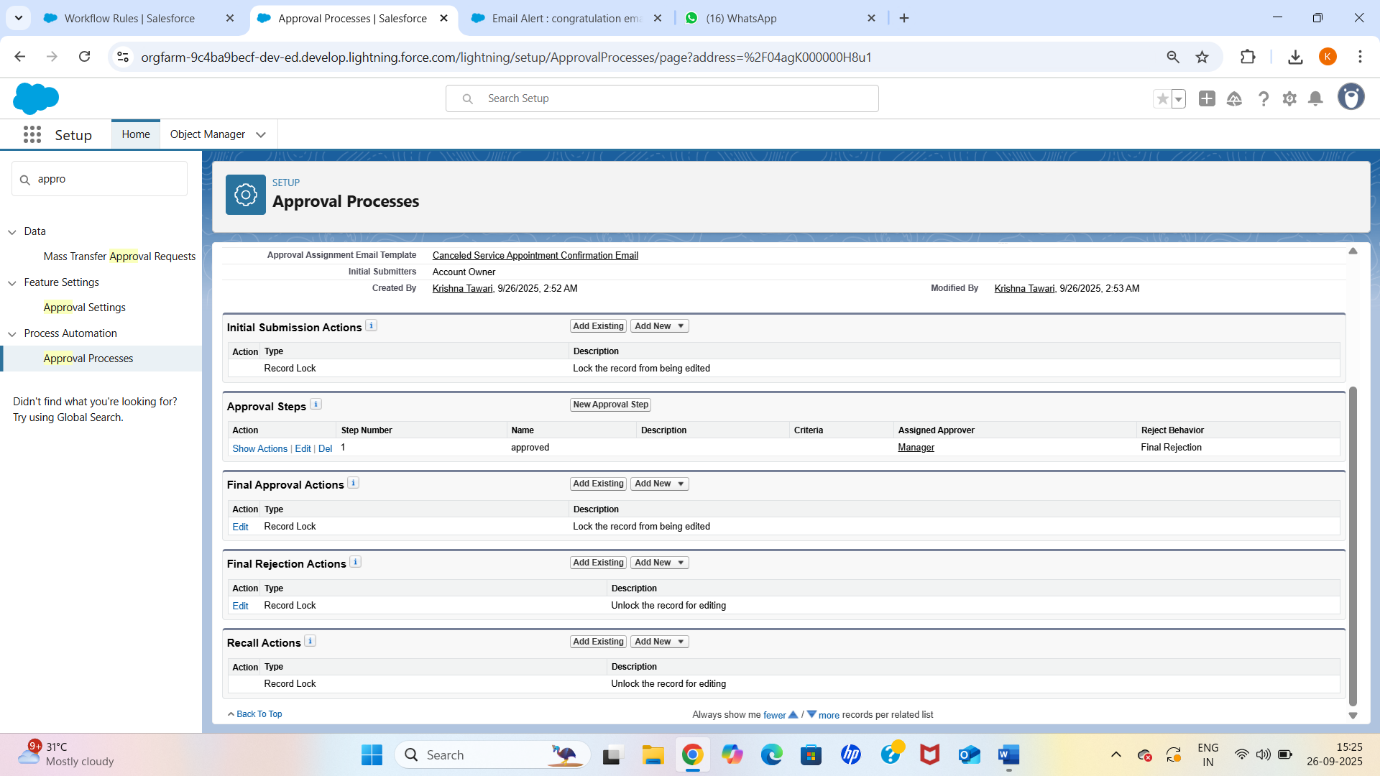
* **Process Name:** Graduation Update
* **Criteria:** When Status\_\_c = "Graduated"
* **Action 1:** Update Field → Graduation\_Date\_\_c = TODAY()
* **Action 2:** Send Email Alert → “Graduation Congratulations Email” to student.



**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**

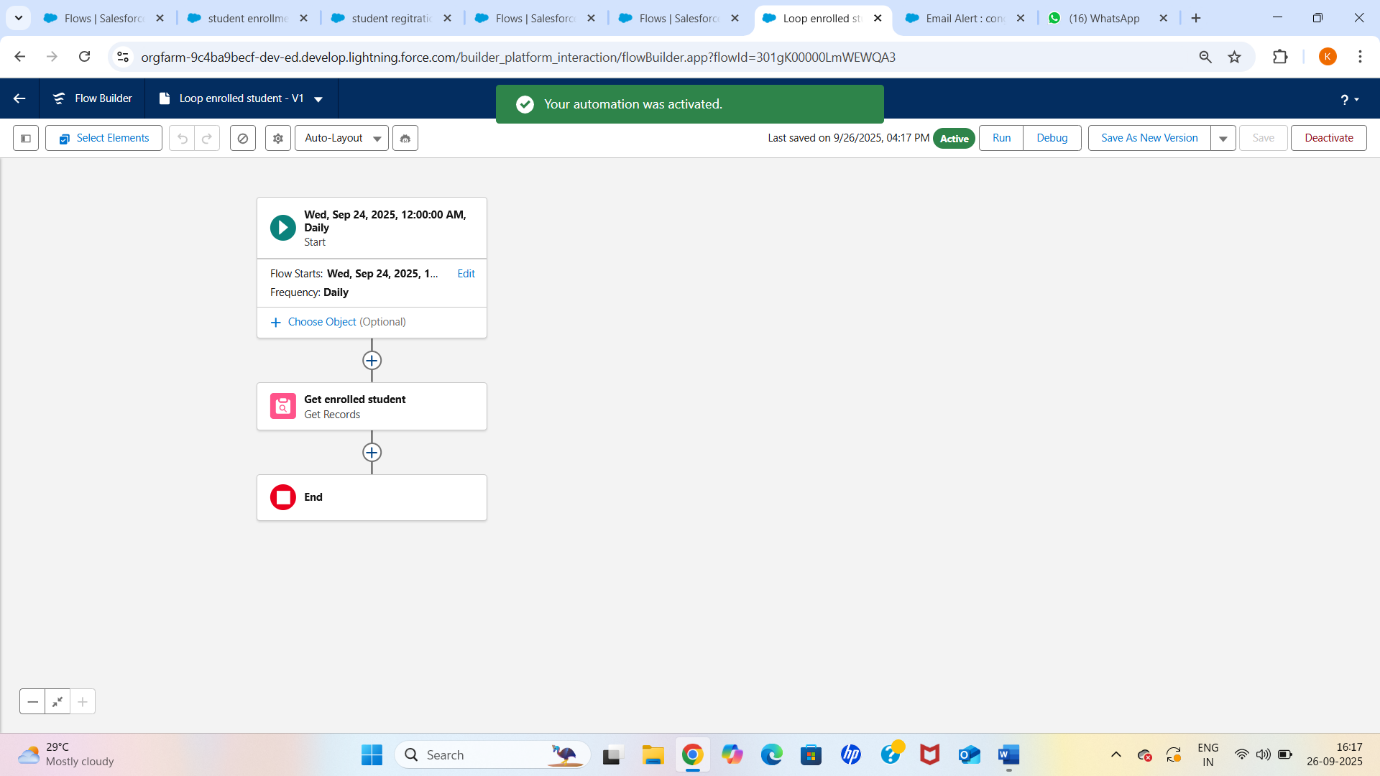
* **When:** A new Student record is created.
* **Condition:** If Enrollment\_Year\_\_c = TEXT(YEAR(TODAY()))
* **Action:** Update Status\_\_c = "Enrolled".

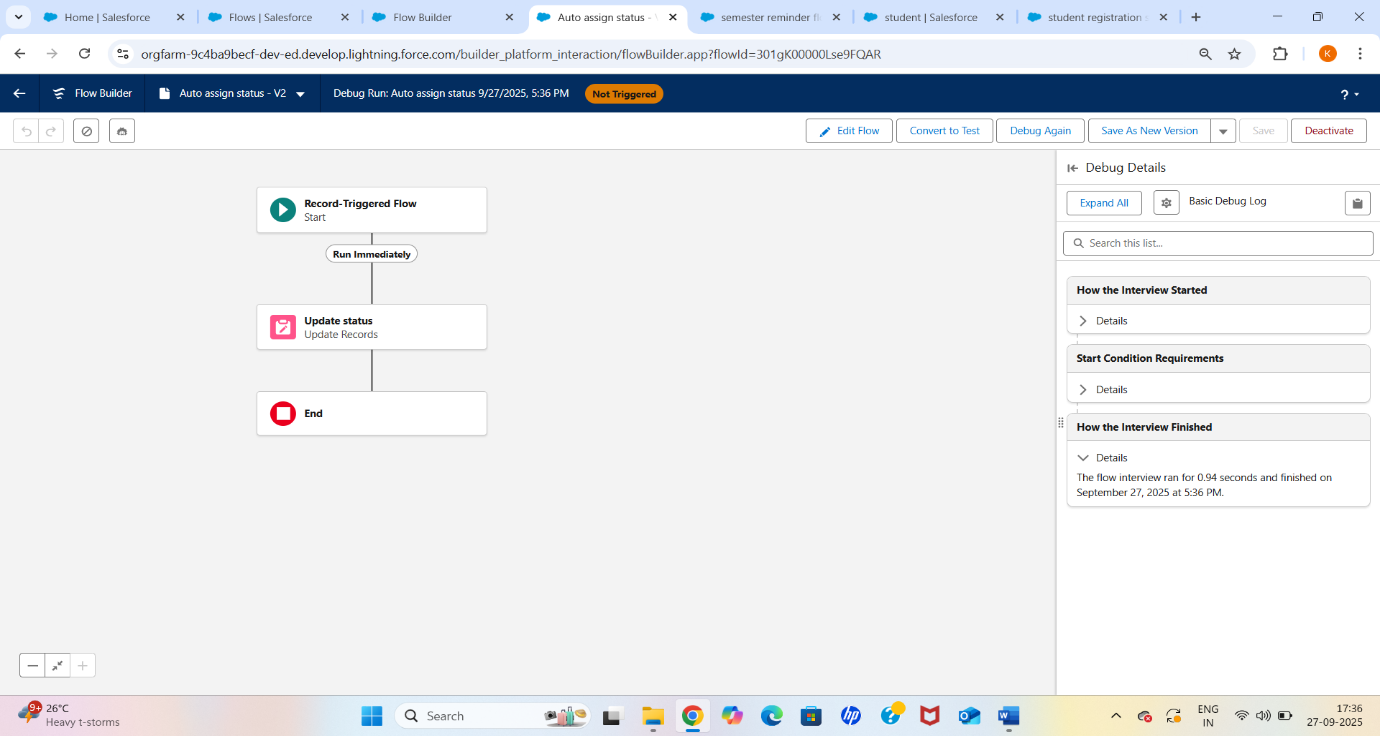
**c) Scheduled Flow: Semester Reminder**

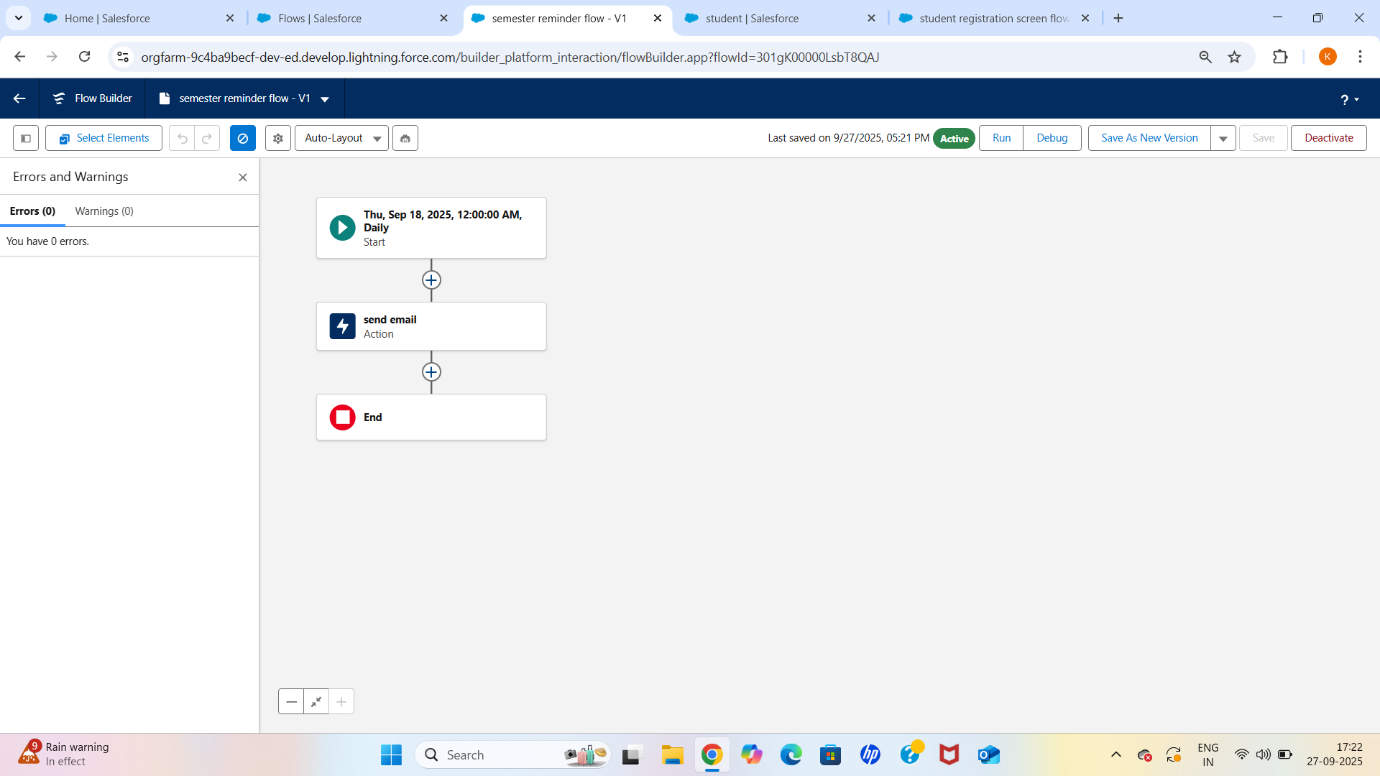
* **When:** Every semester start date (Scheduled path).
* **Action:** Send Email Alert to all Student\_\_c records with Status\_\_c = "Enrolled".

A screenshot of a computer

AI-generated content may be incorrect.



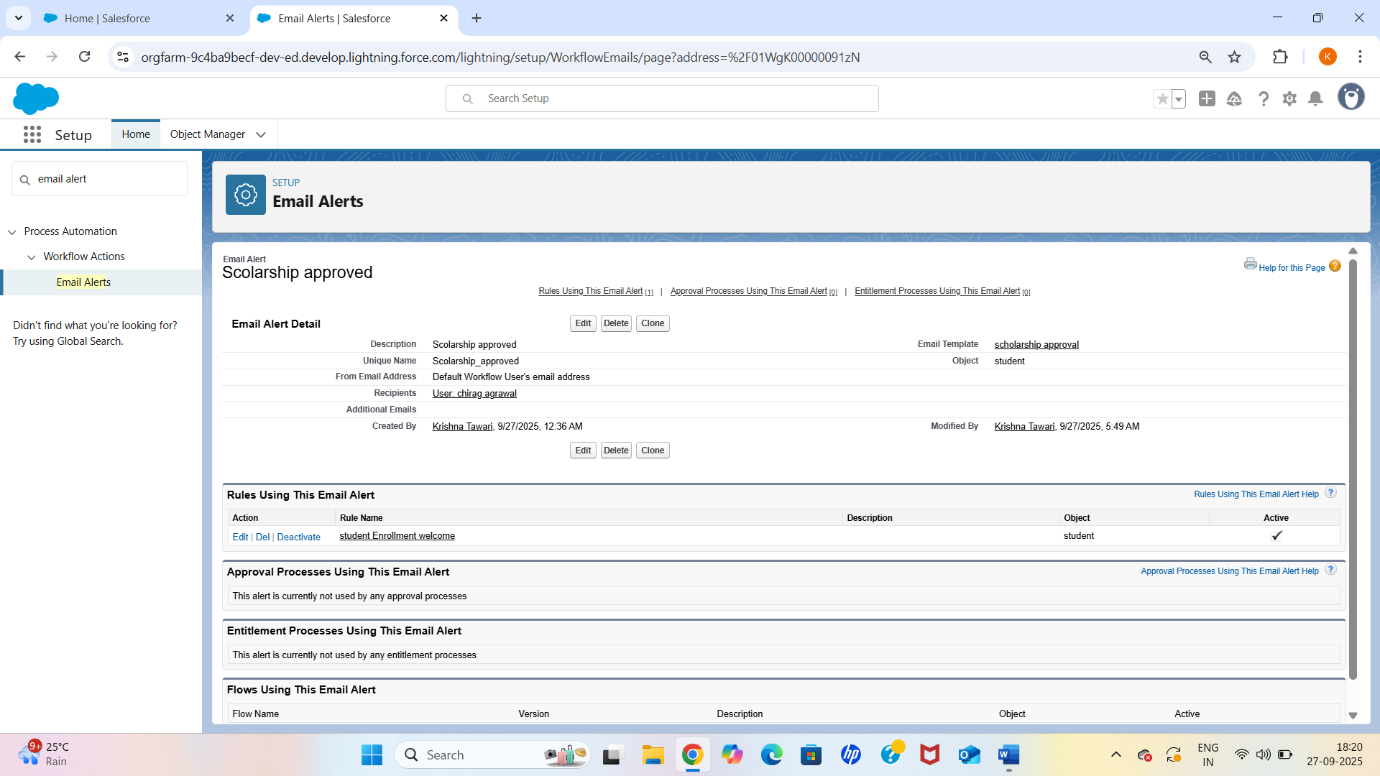


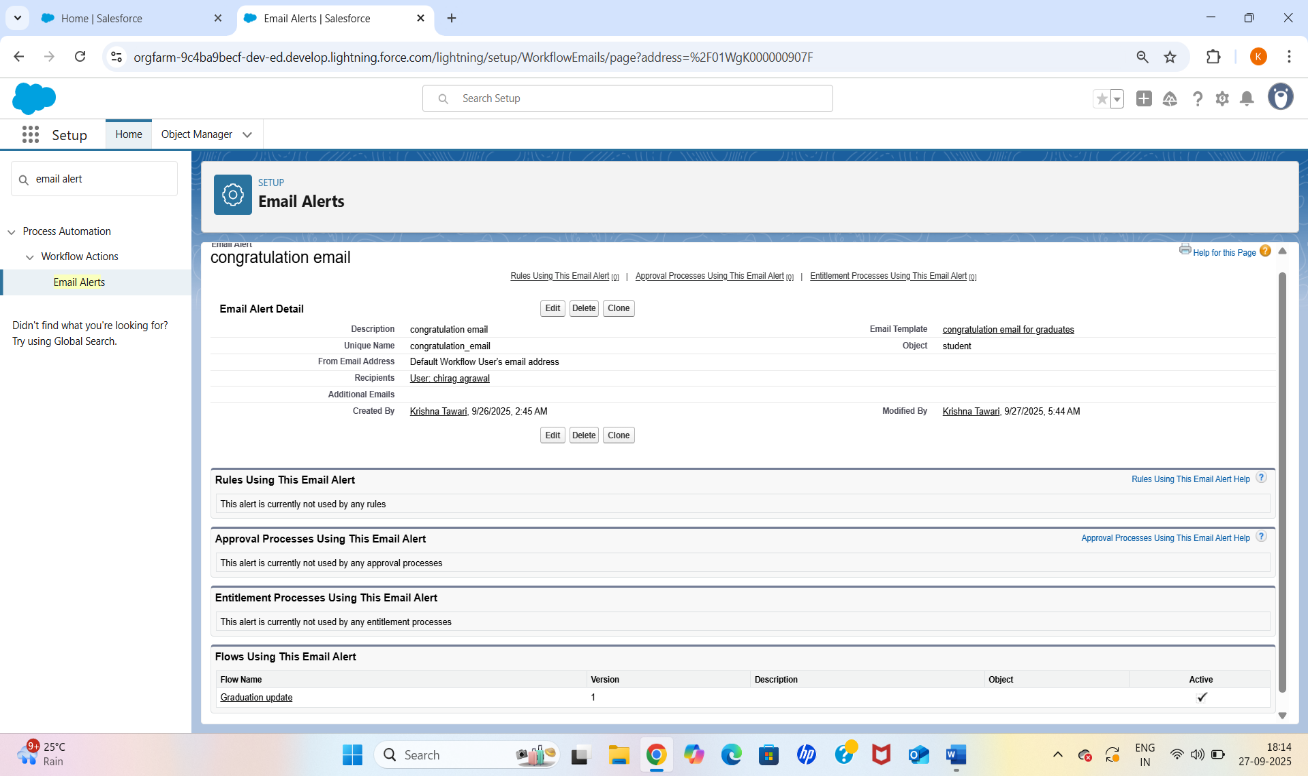


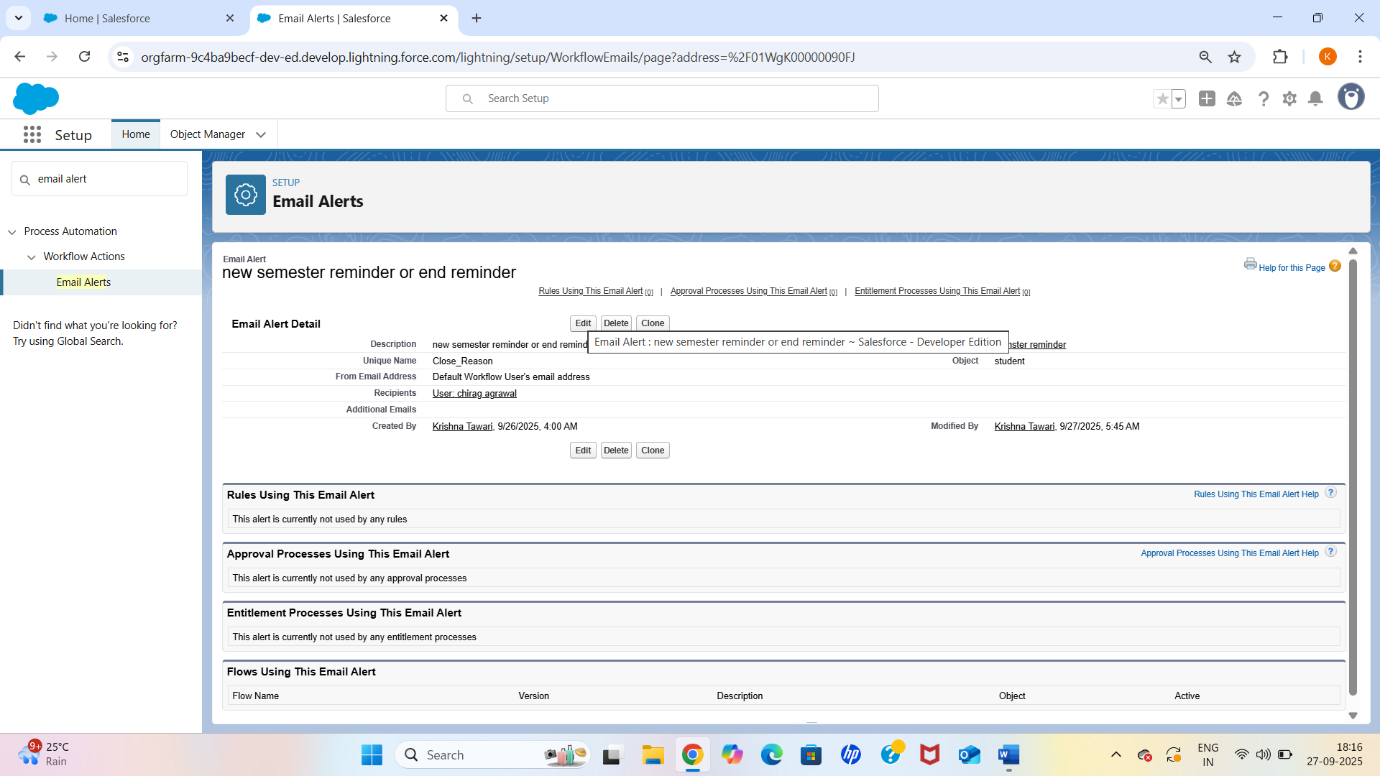
**6. Email Alerts**

**Object:** Student\_\_c

* **Templates Created:**
  1. Semester Reminder Email.
  2. Graduation Congratulations Email.
  3. Scolarship approved







**7. Field Updates**

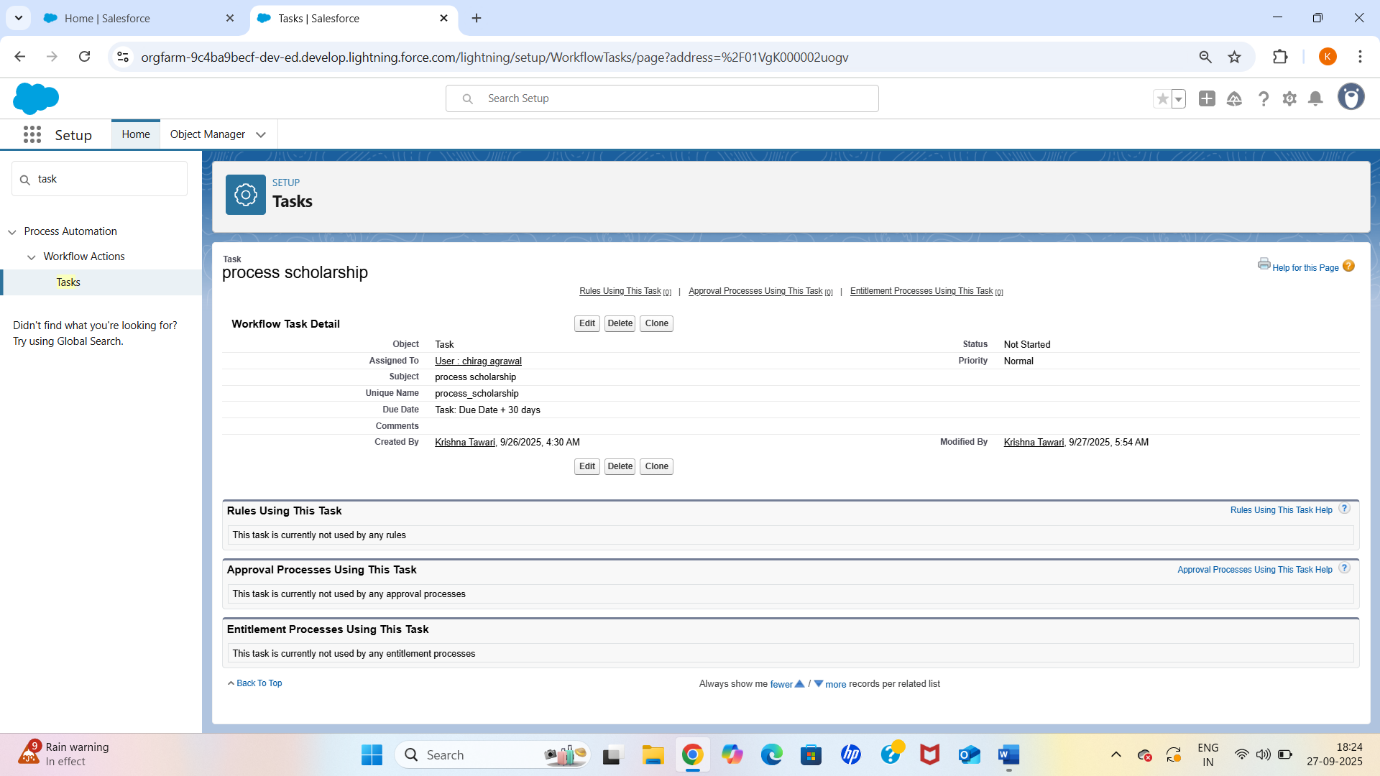
**Objects & Fields:**

* 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.

