

Student Admission — Phase 4: Process Automation

1. Introduction

This phase covers automating the Student Admission process in Salesforce. It includes implementing validation rules, workflow rules, process builder, approval processes, flow builder, email alerts, field updates, tasks, and custom notifications. These automations streamline admission workflows, ensure accuracy, reduce manual effort, and provide timely updates to all stakeholders.

2. Objectives

- Maintain data integrity with **Validation Rules**.
- Automate standard actions using **Workflow Rules**.
- Implement advanced automation logic with **Process Builder**.
- Configure **Approval Processes** for student applications.
- Build advanced automation using **Flow Builder** (Screen, Record-Triggered, Scheduled, Auto-launched).
- Notify users via **Email Alerts** and **Custom Notifications**.
- Update fields automatically with **Field Updates**.
- Assign and track actions using **Tasks**.

3. Configuration Steps

Step 1 — Validation Rules

Validation rules were set up on **Student__c**, **Application__c**, and **Enrollment__c** to prevent invalid data entry and ensure that required conditions are met before records are saved.

The screenshot displays the Salesforce Object Manager interface for configuring a validation rule. The breadcrumb trail shows 'Setup' > 'Home' > 'Object Manager'. The main header is 'Object Manager'. The specific rule being viewed is 'Student Validation Rule', with a 'Back to Student' link. The 'Validation Rule Detail' section includes:

- Rule Name:** Student_Age_Validation (with 'Edit' and 'Clone' buttons)
- Active:** Yes (indicated by a checkmark)
- Error Condition Formula:** AND(ISPICKVAL(Program__c, 'UG'), TODAY() - Date_of_Birth__c < (17 * 365))
- Error Message:** UG students must be at least 17 years old.
- Error Location:** Date of Birth
- Description:** UG students must be at least 17 years old.
- Created By:** Campus Admin, 9/20/2025, 10:47 PM (with 'Edit' and 'Clone' buttons)
- Modified By:** Campus Admin, 9/20/2025, 10:47 PM

[Setup](#)
[Home](#)
[Object Manager](#)

Object Manager

Application Validation Rule

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Validation Rule Detail
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Rule Name	Application_Status_Validation	Active	<input checked="" type="checkbox"/>
Error Condition Formula	AND(ISCHANGED(Status__c) PRIORVALUE(Status__c) = "Accepted", ISPRICKVAL(Status__c, "Submitted"))		
Error Message	Cannot change status from Accepted back to Submitted.	Error Location	Status
Description	Prevent status rollback from Accepted → Submitted		
Created By	Campus Admin 9/20/2025, 10:50 PM	Modified By	Campus Admin 9/20/2025, 10:50 PM

[Edit](#)
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Step 2 — Workflow Rules

Workflow rules were configured to automate actions such as sending email alerts, updating fields, and creating tasks when records met specific conditions.

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Flows

New Application Notification

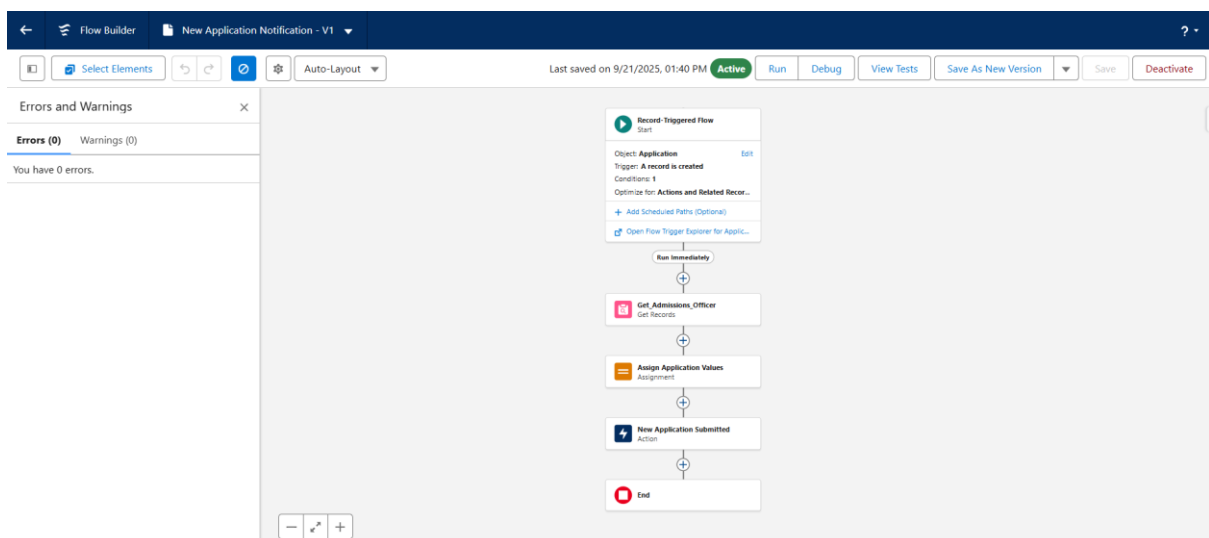
[Back to List: Flows](#)
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Flow Detail
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Flow Label	New Application Notification	Flow API Name	New_Application_Notification
Description	Sends an email notification and creates a task for the Admissions Officer whenever a new application is submitted. Also updates course seats when enrollment is created.		
Environments	Default	Type	Autolaunched Flow
Active Version	1	URL	/flow/New_Application_Notification
Trigger	Record—Run After Save	Activated/Deactivated By	Campus Admin 9/21/2025, 1:10 AM
Modified By	Campus Admin 9/21/2025, 1:10 AM	Created By	Campus Admin 9/20/2025, 11:27 PM

Flow Versions

Action	Flow Label	Version	Description	Built with	Created Date	Type	Status	Progress Status	Run in Mode	API Version for Running the Flow	Log Metrics to Data Cloud
Open Run Deactivate	New Application Notification	1	Sends an email notification and creates a task for the Admissions Officer whenever a new application is submitted. Also updates course seats when enrollment is created.	Flow Builder	9/21/2025, 1:07 AM	Autolaunched Flow	Active	Activated	Default Mode	64.0	<input type="checkbox"/>



Step 3 — Process Builder

Process Builder was used to create multi-step automation. Key processes include automatic creation of **Enrollment__c** when an **Application__c** is accepted and triggering related notifications to students and officers.

The screenshot displays the Salesforce Process Builder interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager'. Below this, a banner promotes Flow Builder. The main section, 'My Processes', shows a table with one process: 'Auto-create Enrollment Record'. This process is described as 'Automatically creates an Enrollment when an Applica... Application' and is of type 'Record Change', last modified on 9/21/2025, and is currently 'Active'.

Below the table, the process flow is visualized. It starts with a 'START' node, followed by an 'Application' object node. A decision diamond labeled 'Application Accepted' follows. If the condition is 'TRUE', the flow proceeds to 'IMMEDIATE ACTIONS', which includes a 'Create Enrollment' action, and then to a 'STOP' node. If the condition is 'FALSE', the flow goes to another decision diamond labeled '+ Add Criteria'. If this condition is 'TRUE', it also leads to 'IMMEDIATE ACTIONS' and then to a 'STOP' node.

Step 4 — Approval Process

Approval process was defined for **Application__c**:

- Entry criteria: Submitted applications.
- Approvers: Department Head or Admissions Officer.
- Approved → Status set to Accepted and Enrollment__c created.
- Rejected → Status set to Rejected and student notified.

Setup Home
Salesforce Go
Service Setup Assistant
Commerce Setup Assistant
Field Service Setup Home (Beta)
Hyperforce Assistant
Release Updates
Salesforce Mobile App
Lightning Usage
Optimizer
Sales Cloud Everywhere

ADMINISTRATION
> Users
> Data
> Email

Flow: Auto_Update_Course_Seats

Flow Detail

Flow Label	Auto_Update_Course_Seats	Flow API Name	Auto_Update_Course_Seats
Description		Namespace Prefix	
Environments	Default	Type	Autolaunched Flow
Active Version	1	URL	/flow/Auto_Update_Course_Seats
Trigger	Record—Run After Save	Activated/Deactivated By	Campus Admin, 9/21/2025, 3:38 AM
Modified By	Campus Admin, 9/21/2025, 3:38 AM	Created By	Campus Admin, 9/21/2025, 3:38 AM

Flow Versions

Action	Flow Label	Version	Description	Built with	Created Date	Type	Status	Progress Status	Run in Mode	API Version for Running the Flow	Log Metrics to Data Cloud
Open Run Deactivate	Auto_Update_Course_Seats	1		Flow Builder	9/21/2025, 3:38 AM	Autolaunched Flow	Active	Activated	Default Mode	64.0	<input type="checkbox"/>

Step 6 — Email Alerts

Automated email alerts notify students, officers, and admins at different stages of the admission process (submission, approval, rejection, pending status).

CampusConnect

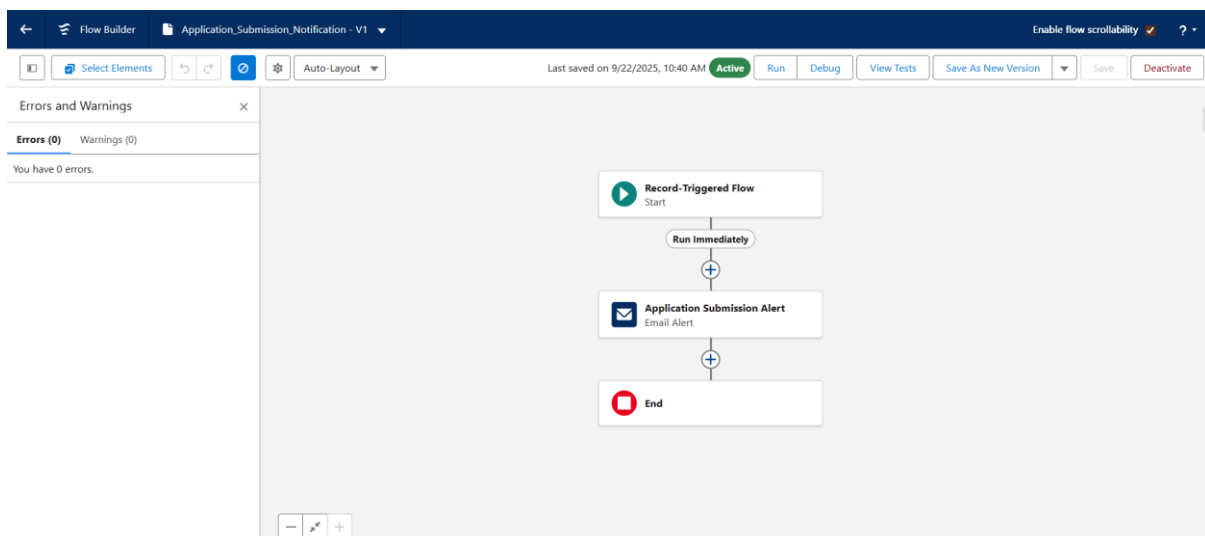
Student Applications Enrollments Courses Application Approval Notif...

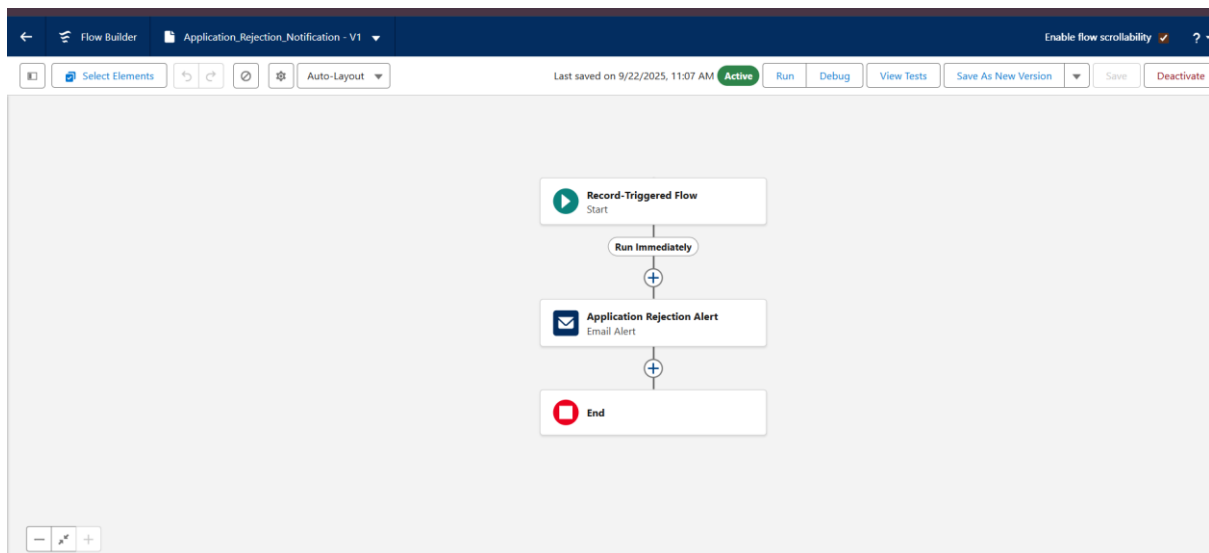
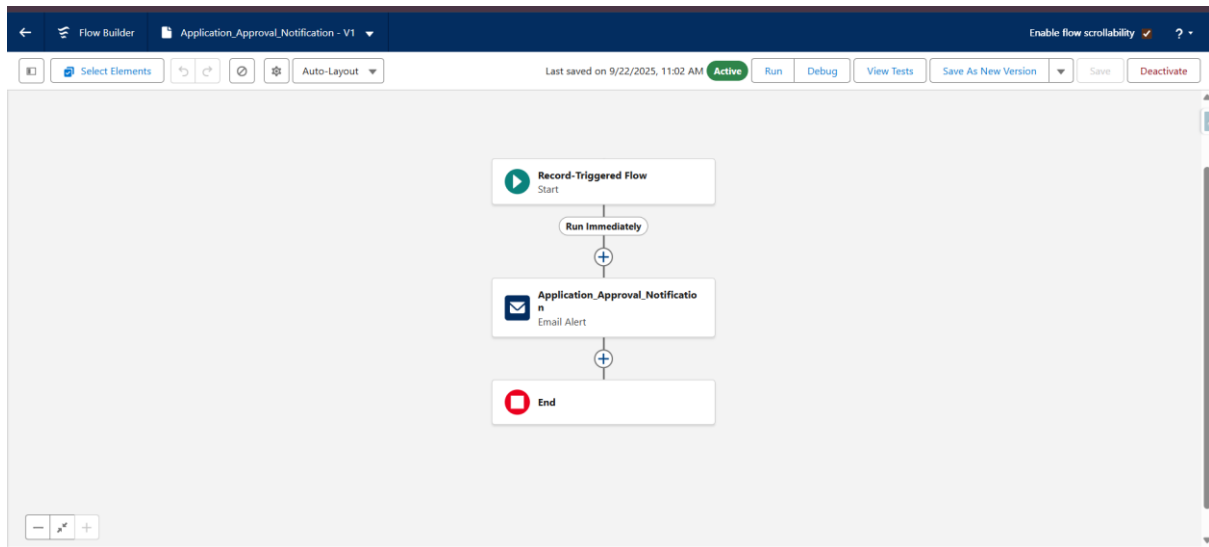
Email Templates

Recent

3 items

EMAIL TEMPLATES	Email Template Name	Description	Folder	Last Modified By	Last Modified Date
Recent	Application Approval Notification	Template to notify students and admins when application is approved.	My Private Email Templates	Campus Admin	9/21/2025, 6:56 PM
Created by Me	Application Rejection Notification	Template to notify students when their application is rejected.	My Private Email Templates	Campus Admin	9/21/2025, 7:25 PM
Private Email Templates	Application Submission Confirmation	Template for student confirmation after application submission.	My Private Email Templates	Campus Admin	9/21/2025, 6:41 PM
Public Email Templates					
All Email Templates					
FOLDERS					
All Folders					
Created by Me					
Shared with Me					





Step 7 — Field Updates

Field updates automatically modify values when automation criteria are met:

- Application__c → Status__c updated after approval.
- Course__c → Seats__c reduced when new Enrollment__c is created.

The screenshot shows the Salesforce Setup interface for configuring Approval Processes. The left sidebar contains the navigation menu with 'Approval Processes' selected. The main content area displays the configuration for an approval process, including a table for 'Approval Steps' and sections for 'Final Approval Actions', 'Final Rejection Actions', and 'Recall Actions'.

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
Show Actions Edit Del	1	Review by Department Head			User Admission Officer	Final Rejection

Final Approval Actions

Action	Type	Description
Edit	Record Lock	Lock the record from being edited
Edit Remove	Field Update	Mark as Accepted

Final Rejection Actions

Action	Type	Description
Edit	Record Lock	Unlock the record for editing
Edit Remove	Field Update	Mark as Rejected

Recall Actions

Action	Type	Description
Edit	Record Lock	Unlock the record for editing

Step 8 — Tasks

Automated tasks were configured for different users:

- Officers → review new applications.
- Students → upload required documents.
- Admins → follow up on pending approvals.