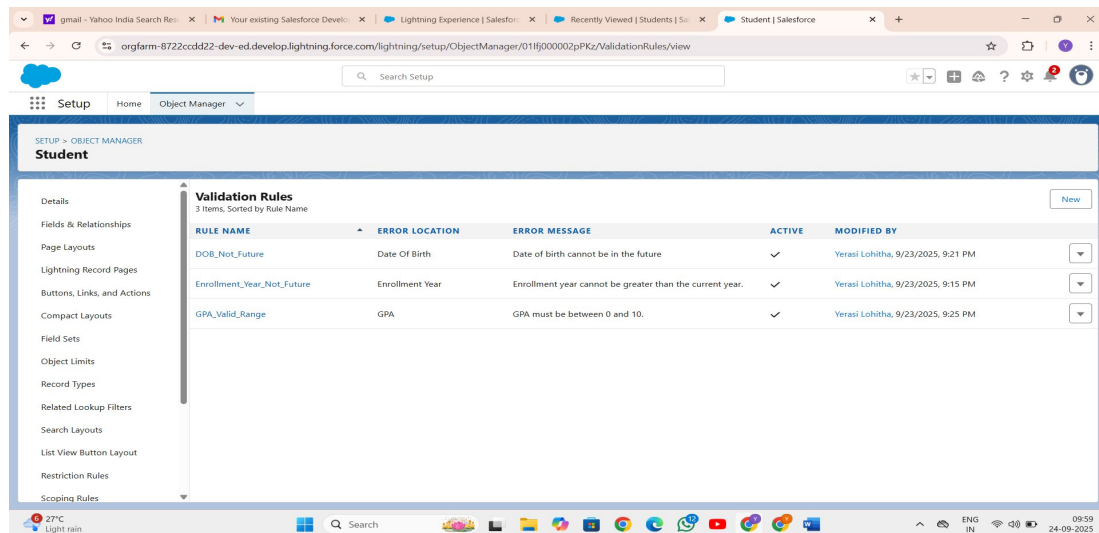# Phase 4: Process Automation (Admin)

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"

Screenshot 1 — Workflow Rules: Inactive_Student_Update

Search Setup

Setup | Home | Object Manager

SETUP
Workflow Rules

Workflow Rule
Inactive_Student_Update

Help for this Page

Go with the flow! With Flow Builder, the future of low-code automation, you can do everything you do with workflow rules — and more! Salesforce plans to retire workflow rules and recommends building automation in Flow Builder. Tell Me More | Migrate your workflow rules to flows

Workflow Rule Detail — Edit | Clone | Deactivate

Rule Name	Inactive_Student_Update	Object	Student
Active	✓	Evaluation Criteria	Evaluate the rule when a record is created, and every time it's edited
Description			
Rule Criteria	Enrollment_Year__c <YEAR(TODAY())		
Created By	Yerasi Lohitha, 9/23/2025, 9:34 PM	Modified By	Yerasi Lohitha, 9/23/2025, 9:35 PM

Workflow Actions — Edit

Immediate Workflow Actions

Type	Description
Field Update	Set Status Inactive

Time-Dependent Workflow Actions — See an example

You cannot add time-dependent workflow actions because your evaluation criteria is "Every time a record is created or edited". Change Evaluation Criteria

27°C Light rain

Screenshot 2 — Workflow Rules: Send_Welcome_Email

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Quick Find

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

PLATFORM TOOLS
> Subscription Management

SETUP
Workflow Rules

Workflow Rule
Send_Welcome_Email

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Workflow Rule Detail — Edit | Clone | Deactivate

Rule Name	Send_Welcome_Email	Object	Student
Active	✓	Evaluation Criteria	Evaluate the rule when a record is created
Description			
Rule Criteria	TRUE		
Created By	Yerasi Lohitha, 9/23/2025, 9:43 PM	Modified By	Yerasi Lohitha, 9/23/2025, 9:45 PM

Workflow Actions — Edit

Immediate Workflow Actions

Type	Description	Workflow Rule: Send_Welcome_Email ~ Salesforce - Developer Edition
Email Alert	Welcome email to student1	

Time-Dependent Workflow Actions — See an example

You cannot add new time triggers to an active rule. Deactivate This Rule

28°C Cloudy

Screenshot 3 — Workflow Rules: Low_GPA_Task

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Setup | Home | Object Manager

work

Process Automation
  Workflow Actions
    Email Alerts
    Field Updates
    Outbound Messages
    Send Actions
    Tasks
  Workflow Rules
User Interface
  Console Settings
    Console Workspace Page Loading Preference
  Translation Workbench
    Export
    Import
    Override
    Translate
    Translation Language

SETUP
Workflow Rules

Workflow Rule
Low_GPA_Task

Help for this Page

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Workflow Rule Detail — Edit | Clone | Deactivate

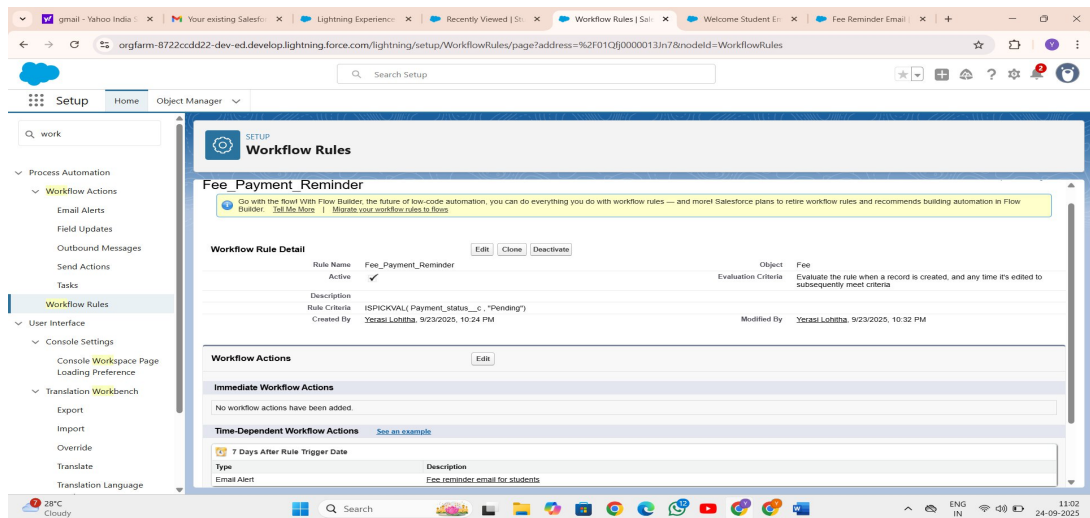|		
Rule Name	Low_GPA_Task	Object	Student
Active	✓	Evaluation Criteria	Evaluate the rule when a record is created, and every time it's edited
Description			
Rule Criteria	GPA__c <5		
Created By	Yerasi Lohitha, 9/23/2025, 10:16 PM	Modified By	Yerasi Lohitha, 9/23/2025, 10:19 PM

Workflow Actions — Edit

Immediate Workflow Actions

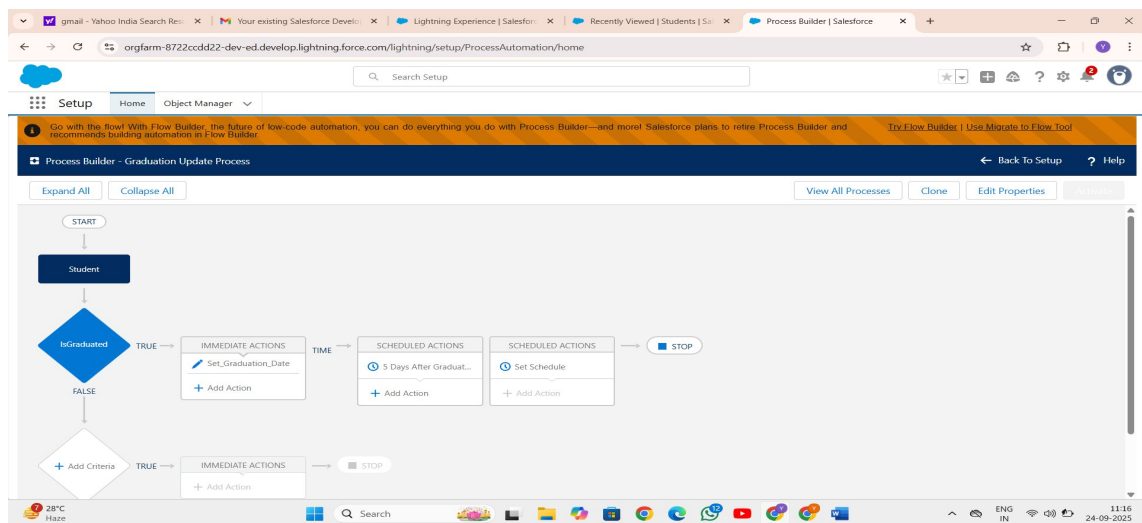| Type	Description	Workflow Rule: Low_GPA_Task ~ Salesforce - Developer Edition
Task	Review Low GPA Student	

Time-Dependent Workflow Actions — See an example

You cannot add time-dependent workflow actions because your evaluation criteria is "Every time a record is created or edited". Change Evaluation Criteria

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3. Process Builder

Object: Student__c

- **Process Name:** Graduation Update

- **Criteria:** When Status__c = "Graduated"

- **Action 1:** Update Field → Graduation_Date__c = TODAY()

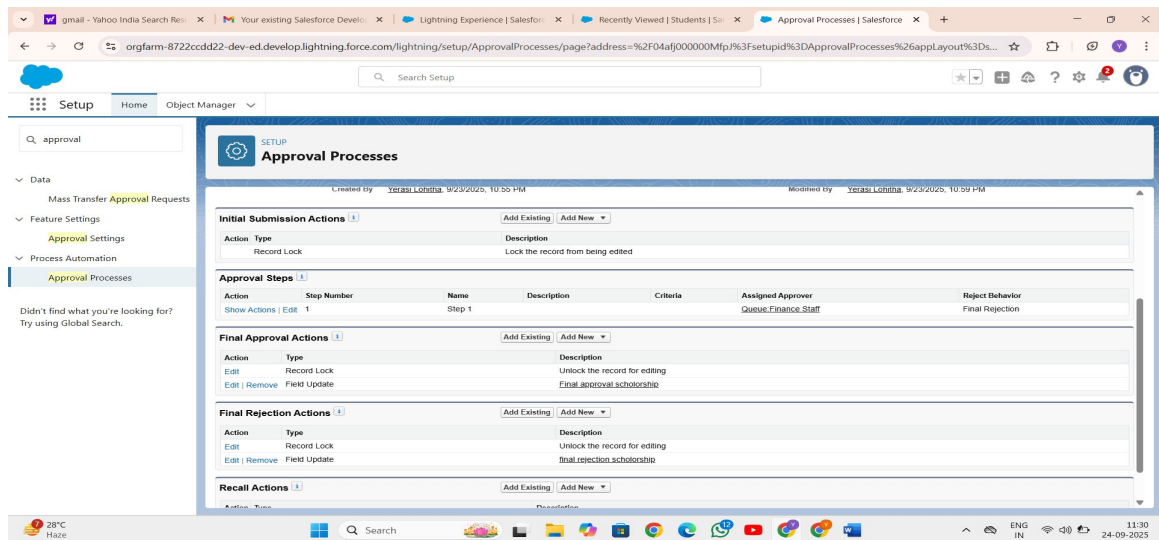- **Action 2:** Send Email Alert → "Graduation Congratulations Email" to student.

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".

d) Auto-Launched Flow: Calculate Student Age

- **Formula:** TODAY() - Date_of_Birth__c

- **Action:** Update Age__c field in Student__c.

Screenshot 1 — Screen Student Registration Flow (Create Records)

Flow Builder — Screen Student Registration - V1

Last saved on 9/24/2025, 11:51 AM — Active

Flow elements:
- Screen Flow / Start
- Student screen element / Screen
- Create Student Record / Create Records
- End

Create Records

* Object
Student

Set Field Values for the Student

Field	Value
First Name	Student screen element > First Name
Last Name	Student screen element > Last Name
Email	Student screen element > Email > Required
Enrollment Year	Student screen element > Enrollment Year
status	Student screen element > status

+ Add Field

☐ Manually assign variables (advanced)

Check for Matching Records — Disabled

Screenshot 2 — RTF AutoAssignStatus Flow (Update Records)

Flow Builder — RTF AutoAssignStatus - V1

Last saved on 9/24/2025, 12:10 PM — Active

Flow elements:
- Record-Triggered Flow / Start
- Update Records / Update Records
- End

Update Records

* Label
Update Records

* API Name
Update_Records

Description

*How to Find Records to Update and Set Their Values
- ● Use the student record that triggered the flow
- ○ Update records related to the student record that triggered the flow
- ○ Use the IDs and all field values from a record or record collection
- ○ Specify conditions to identify records, and set fields individually

Because this flow runs *before* a record is saved, you can only update the record that triggered the flow to run. To update other records, configure the trigger to run the flow *after* the record is saved.

Set Filter Conditions

Condition Requirements to Update Record
None—Always Update Record

Set Field Values for the Student Record

Field	Value

Screenshot 3 — Scheduled Semester Reminder Flow (Loop)

Flow Builder — Scheduled_Semester_Reminder - V1

Last saved on 9/24/2025, 12:54 PM — Active

Flow elements:
- Fri, Sep 26, 2025, 10:00:00 AM, Weekly / Start
  - Flow Starts: Fri, Sep 26, 2025, 10:... Edit
  - Frequency: Weekly
  - + Choose Object (Optional)
- Get_Enrolled_Students / Get Records
- Loop_Students / Loop
  - For Each / After Last
- Send Email / Action

Loop

* Label
Loop_Students

* API Name
Loop_Students

Description

Start a loop path for iterating over items in a collection variable. For each iteration, the flow temporarily stores the item in the loop variable.
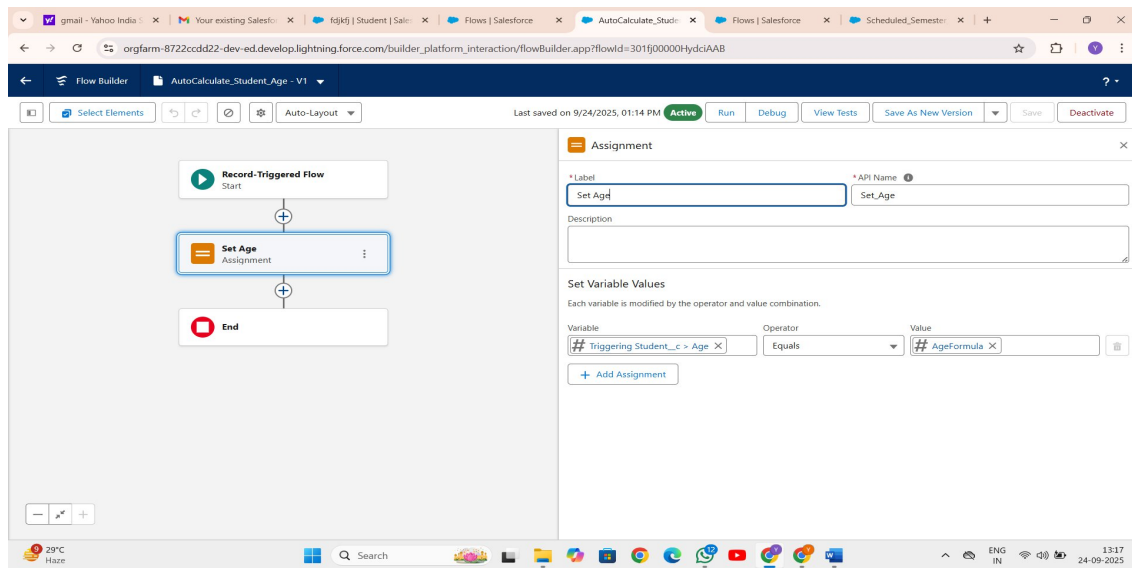
Select Collection Variable

* Collection Variable
Students from Get_Enrolled_Students

Specify Direction for Iterating Over Collection
* Direction
- ● First item to last item
- ○ Last item to first item

To use the current item in other elements in the loop, use the API name of the Loop element. Example: if your flow iterates over accounts with a Loop element named "My_Account_Loop" you can reference the current item from that loop element. Just start typing "My_Account_Loop" and select "Current Item from Loop My_Account_Loop".
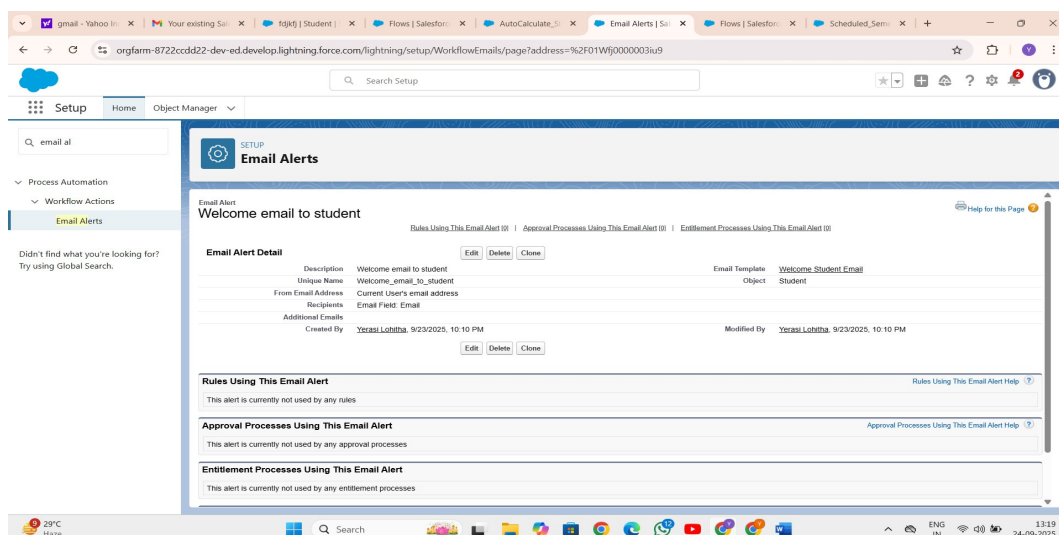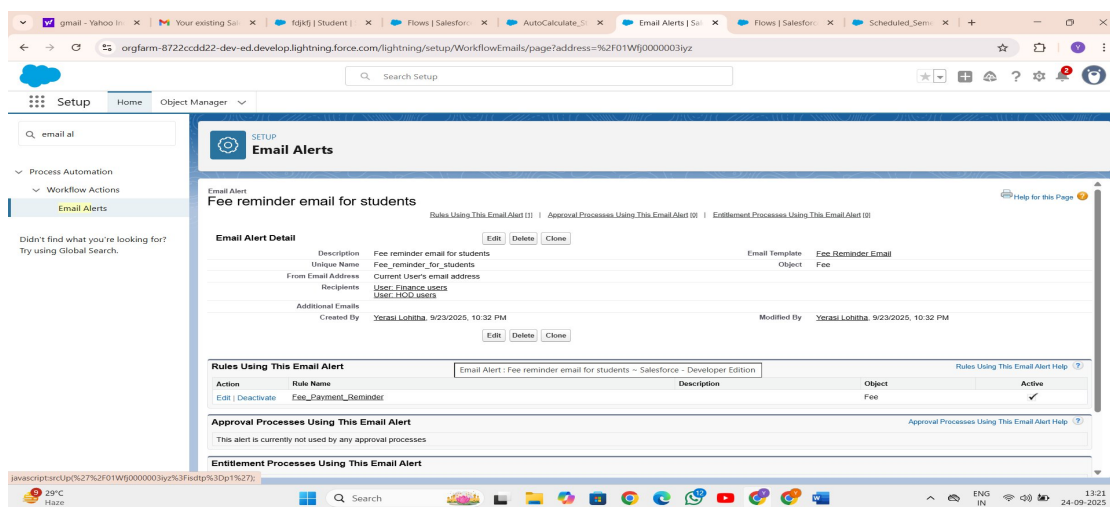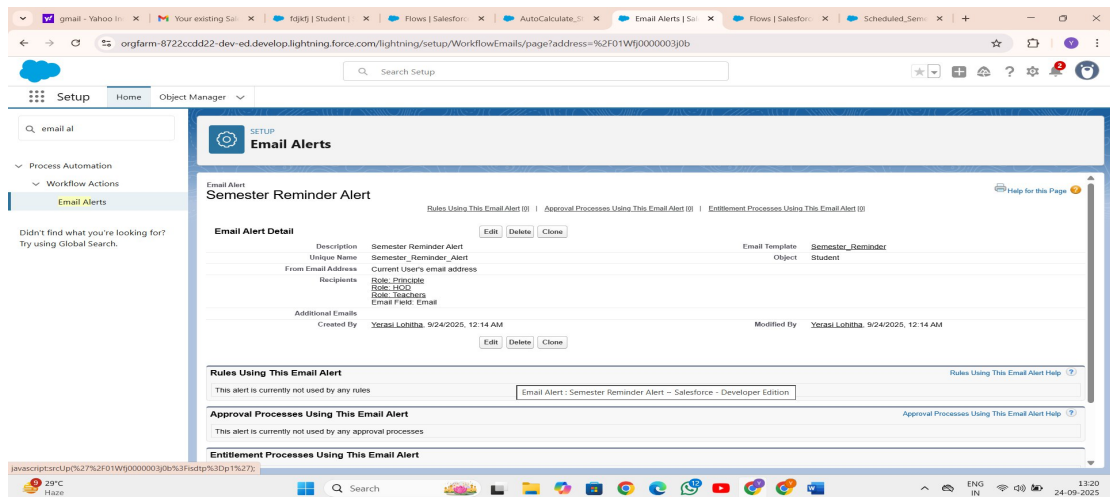
Tips

6. Email Alerts

Object: Student__c

- **Templates Created:**

  1. Welcome Student Email (after registration).

  2. Semester Reminder Email.

  3. Graduation Congratulations Email.

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:** Checks whether a student is having low GPA than the standard eligibility GPA.

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.