Phase 4: Automation, Approval Processes, and Reporting

Summary of Phase 4 Deliverables

Phase 4 implements automation (Flows), validation rules, an approval process, scheduled summary flows, email alerts and reporting dashboards. The key deliverables are:
- Validation Rules (Donation amount > 0)
- Record-triggered Flows (Orientation task for new volunteers; Large-donation email notifications)
- Approval Process for large donations (threshold ≥ ₹100,000)
- Scheduled Flow that summarises monthly donations into Donation_Summary__c
- Reports & Dashboards (Monthly Donation Summary Report, Fundraising Dashboard)
- Debug logs, test cases, and fixes for duplicate month records.

This doc reflects what was implemented in your Dev Org and includes exact resource names, labels, variables, and formulas you used.

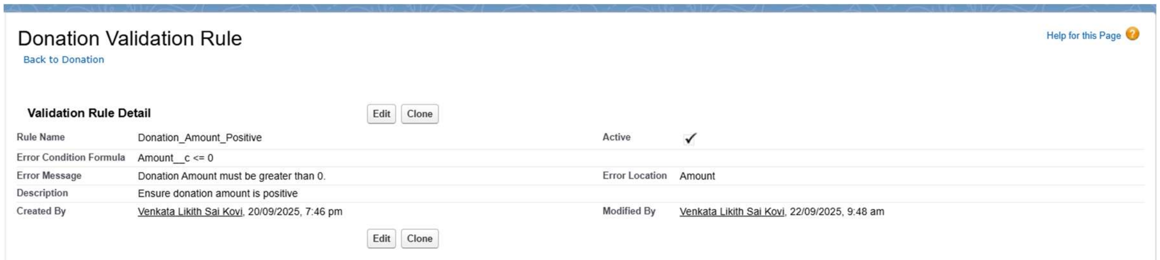
Step 1: Validation Rule — Donation Amount Must Be Greater Than Zero

Purpose: Prevent invalid donation records where the amount is zero or negative. This preserves reporting accuracy.

Steps:-

1. Click the Gear icon → Setup.
2. In Quick Find type: Object Manager → click Object Manager.
3. Find and click: Donation (Donation__c).
4. In left menu click: Validation Rules → New.
5. Fill fields exactly as below:
   - Rule Name: Validate_Donation_Amount
   - Description: Ensure donation amount is positive
   - Error Condition Formula:
     Amount__c <= 0
   - Error Message: Donation amount must be greater than 0.
   - Error Location: Field → Amount

6. Click Save, then Activate (if not active automatically).

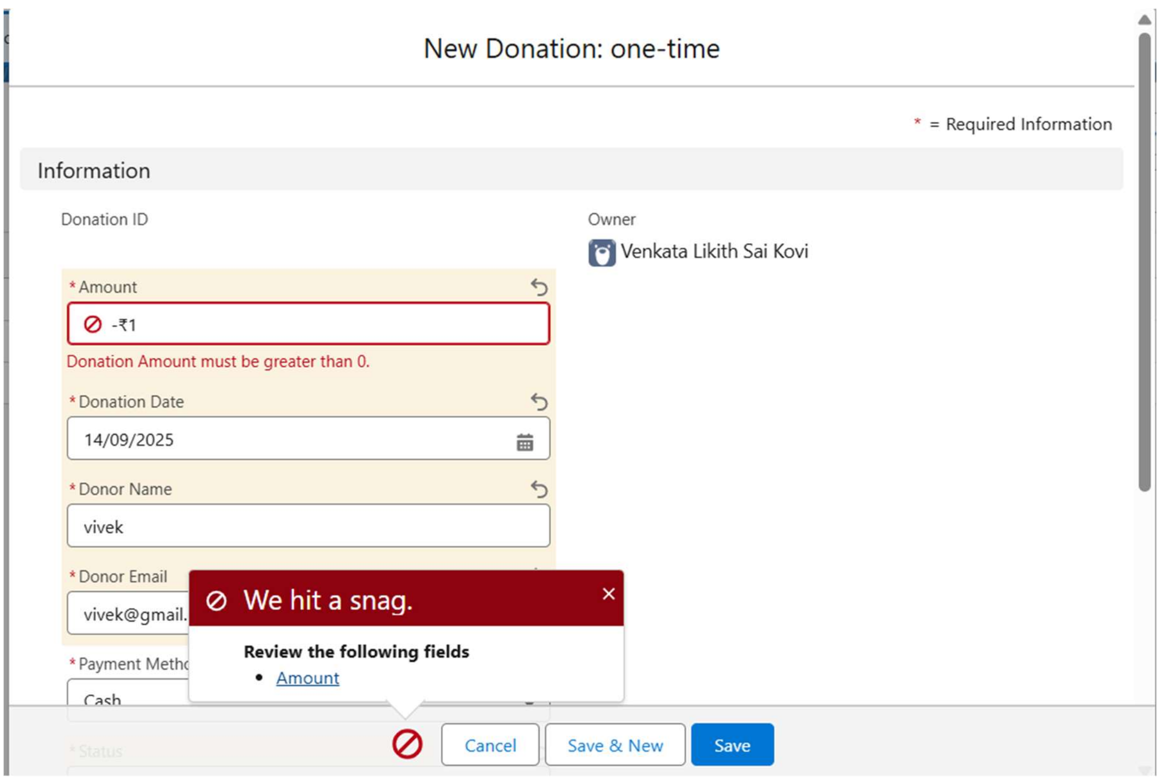


Test case :

• Create a Donation record with Amount = -1

→ Attempt to save

→ Expected Result: Validation error displayed near the Amount field.

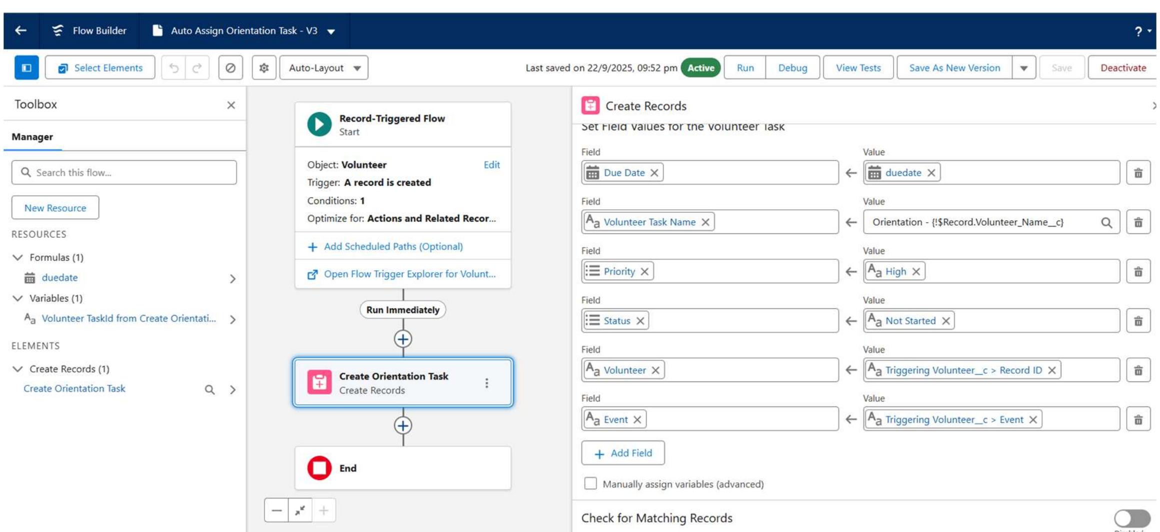


Step 2: Record-Triggered Flow — Auto-assign 'Orientation' Volunteer Task

Purpose: When a new Volunteer__c record is created, automatically create a VolunteerTask__c record for orientation so onboarding is tracked and consistent.

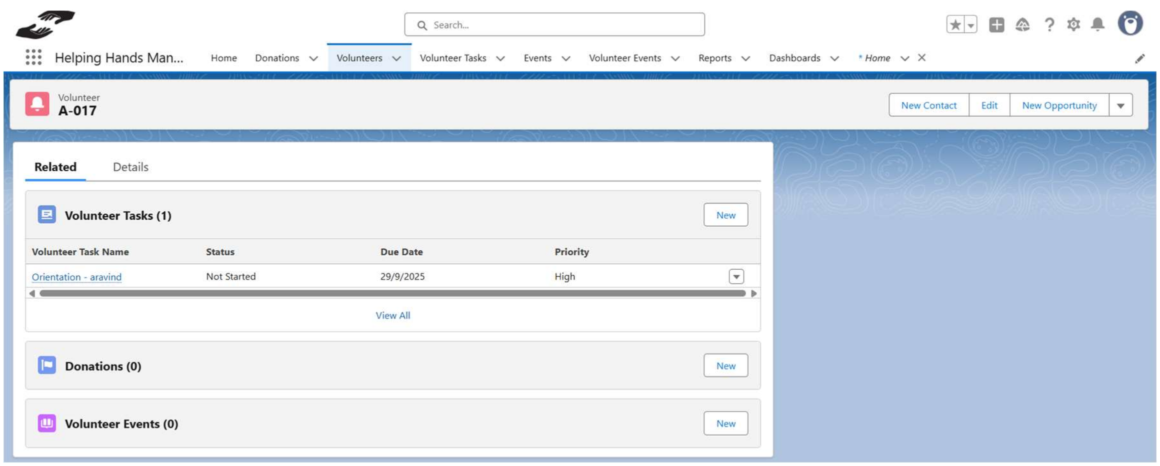
Implementation details (exact):

1. Setup → Quick Find → Flows → Flows → New Flow.
2. Choose: Record-Triggered Flow → Create.
3. Configure Start:
   - Object: Volunteer (Volunteer__c)
   - Trigger: A record is created
   - Condition Requirements: None (or Status__c = 'Onboarding' if you only want to run for that status)
   - Optimize the Flow for: Actions and Related Records
4. Click Done.
5. Add a Create Records element:
   - Label: Create Orientation Task
   - Create One Volunteer Task (VolunteerTask__c)
   - Set Field Values:
     Name (Task Name): 'Orientation - ' & {!$Record.Volunteer_Name__c}
     Assigned_Volunteer__c: {!$Record.Id}
     Status__c: Not Started
     Priority__c: High
     Due_Date__c: Use a Date Formula Resource (DueDateFormula) = TODAY() + 7
6. Save Flow Label: Auto_Assign_Orientation_Task. Save and Activate.



Test steps :

1. App Launcher → Helping Hands → Volunteers → New Volunteer.
2. Fill Volunteer_Name__c = 'Test Volunteer Onboard', other fields as needed → Save.
3. Open the volunteer record → scroll to Volunteer Tasks related list → Confirm 'Orientation - Test Volunteer Onboard' exists.

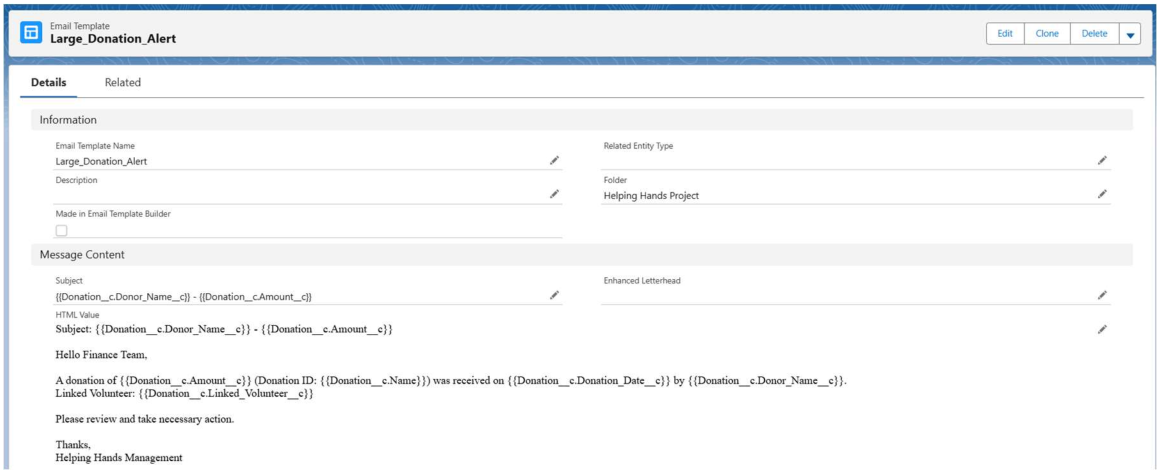


Step 3: Record-Triggered Flow — Email Alert for Large Donations (>= ₹10,000)

Purpose: Notify Finance Officer (or a Role) when any donation equal to or greater than ₹10,000 is created so that high-value gifts receive timely attention.

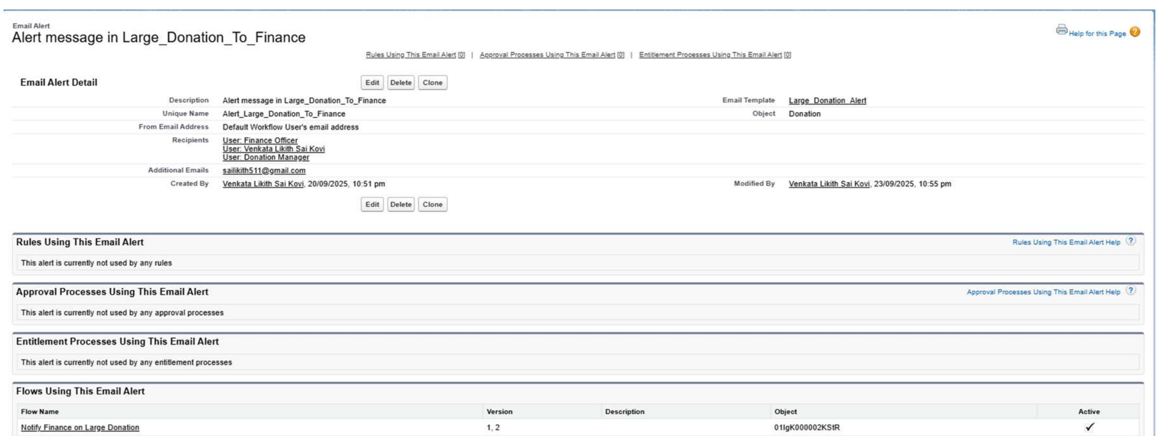
Implementation steps :

A. Create Email Template (Lightning Email Template):
1. Setup → Email Templates → New Email Template.
2. Template Name: Large Donation Alert
3. Subject: Large donation received: {!Donation__c.Donor_Name__c} - {!Donation__c.Amount__c}
4. Body: include merge fields for Donation__c.Donor_Name__c, Donation__c.Amount__c, Donation__c.Donation_Date__c and link to the Donation record.
5. Save in folder: Helping Hands Templates (or Unfiled Public Email Templates).



B. Create Email Alert:

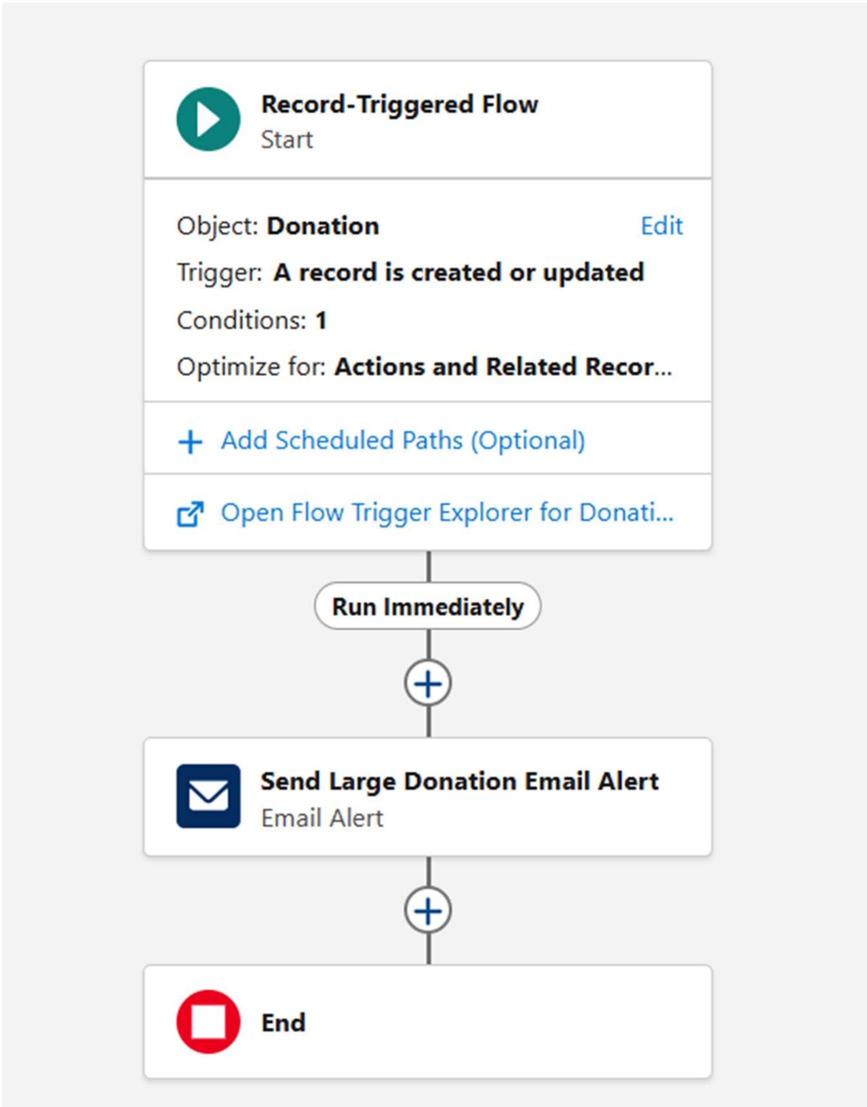
1. Setup → Quick Find → Email Alerts → New Email Alert.
2. Object: Donation
3. Email Template: Large Donation Acknowledgement
4. Recipient Type: Role → Financial Officer (or specific user)
5. Save



C. Record-Triggered Flow:

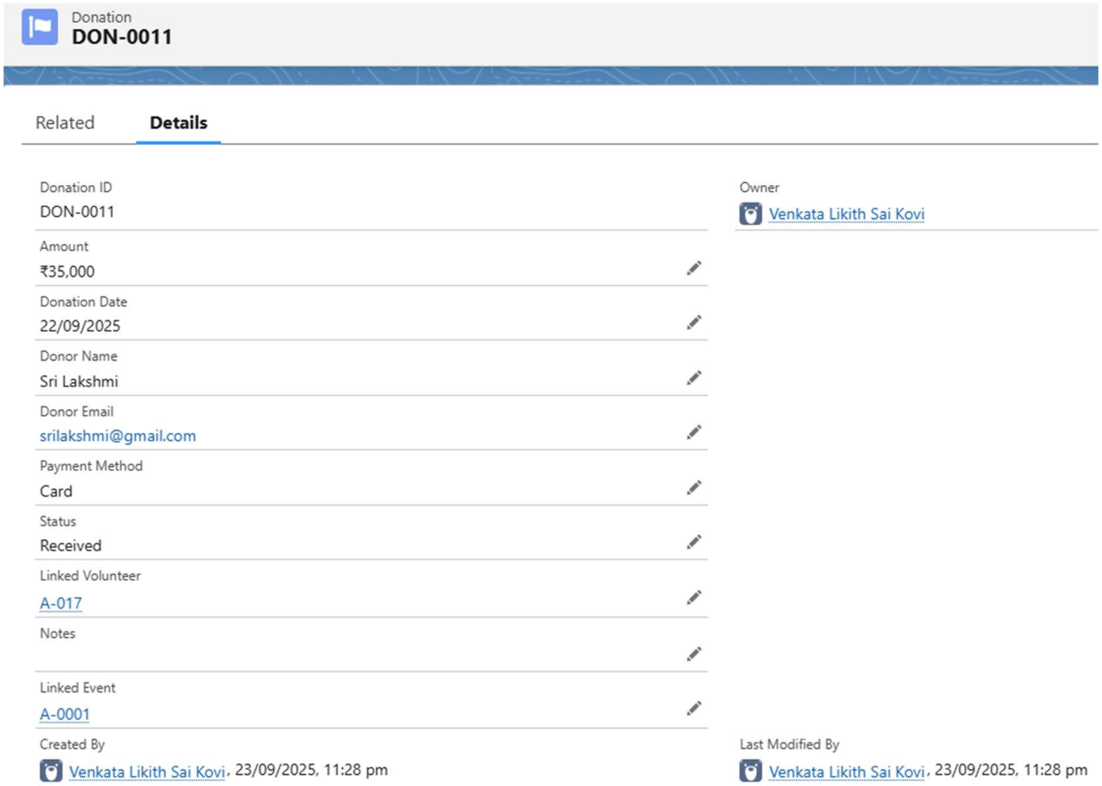
1. Setup → Flows → New Flow → Record-Triggered Flow
2. Object: Donation (Donation__c)
3. Trigger: A record is created or updated
4. Condition Requirements: Amount__c >= 10000
5. Run After Save (so email actions can execute)
6. Add an Action element → select the Email Alert

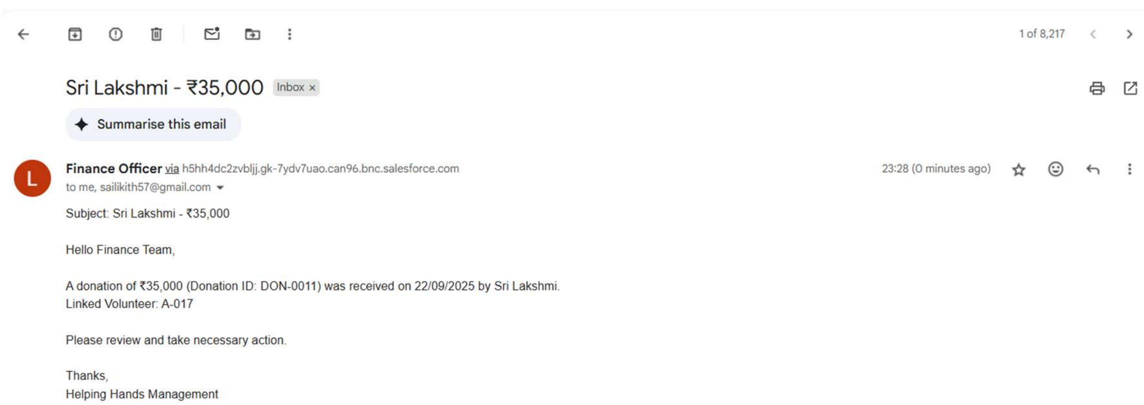
(EA_LargeDonation_NotifyFinance)
7. Save Flow Label: Notify_Finance_on_Large_Donation. Activate.



Test example :

• Create Donation record with Amount = 15000, Donor_Name__c = 'Test Donor Email'.
• Save → Check the Financial Officer's email inbox or the email logs in Salesforce.



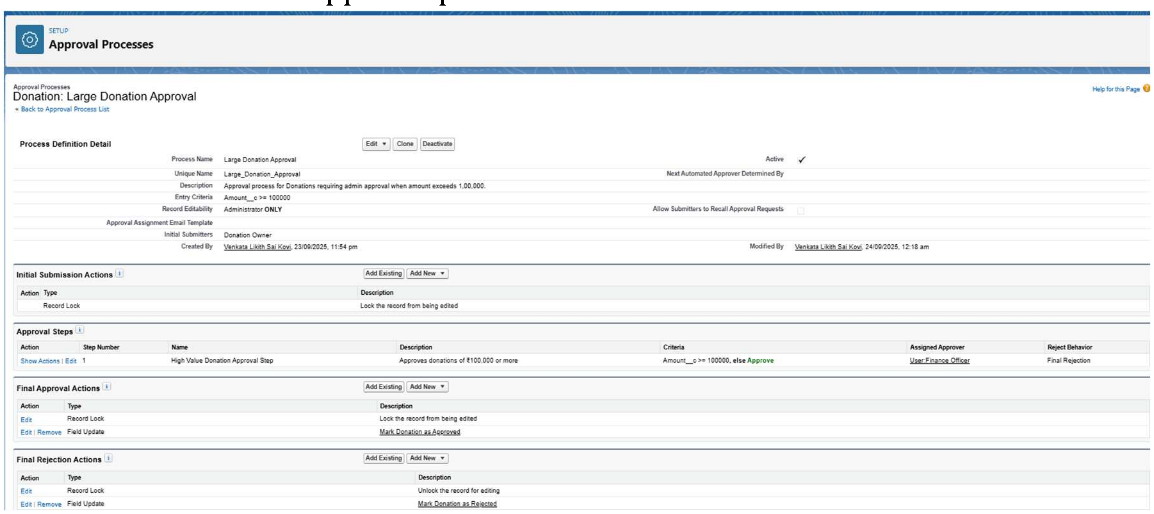


Step 4: Approval Process — Large Donation Approval (>= ₹100,000)

Purpose: Implement a formal approval process for very large donations to ensure financial oversight. You implemented an approval process that routes donations >= ₹1,00,000 to the Finance Officer.

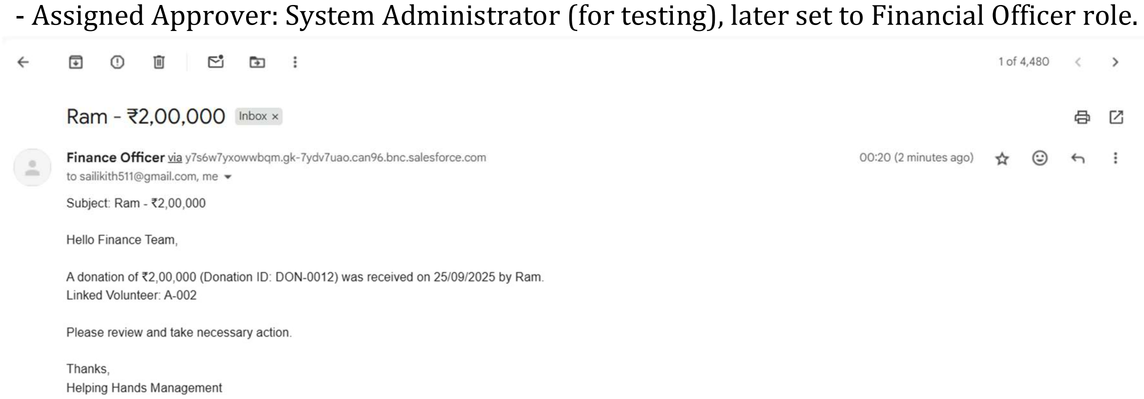
Steps performed (Jump Start Wizard approach):

1. Setup → Quick Find → Approval Processes → Approval Processes.
2. Select Object: Donation.
3. Click Create New Approval Process → Use Jump Start Wizard.
4. Fill: Name = Large Donation Approval, Description as needed.
5. Entry Criteria: Amount__c greater or equal 100000.
6. Select Approver: Automatically assign to approver(s) → User: choose Finance Officer (or CFO). For testing you used System Administrator user.
7. Final Approval Action → Add New → Field Update: set Status__c = 'Approved'
8. Final Rejection Action → Add New → Field Update: set Status__c = 'Rejected'
9. Save → Activate the approval process.



Approval Step (added):

• Created an Approval Step named 'High Value Donation Approval Step'.
- Step Criteria: Amount__c >= 100000
- Assigned Approver: System Administrator (for testing), later set to Financial Officer role.



Step 5: Scheduled Flow — Monthly Donation Summary (Detailed)

Purpose: Create a scheduled automation that computes monthly donation totals and stores them in Donation_Summary__c. Because Lightning Scheduled Flow may not show 'Monthly' frequency, we scheduled it Daily and used a Decision to run only on the first of the month.

Flow design steps:-
1. Flow type: Schedule-Triggered Flow (configured as Daily; Decision checks DAY(TODAY()) = 1)

2. Flow Label: Monthly Donation Summary (Daily Check)

3. Manager Resources created:
  - Variable: TotalAmount (Number, scale 2, default 0)
  - Variable: DonationCount (Number, scale 0, default 0)
  - Formula: MonthYearText (Text) = TEXT(MONTH(TODAY())) & "-" & TEXT(YEAR(TODAY()))
  - Formula (IsFirstOfMonth) or Decision: DAY(TODAY()) = 1

4. Schedule: Start Date = (for testing) 24-Sep-2025; Frequency = Daily; Start Time = as selected

5. Flow Elements and exact labels used:
  - Start (Schedule) -> Decision (Check if First Day of Month)
    Decision Outcome: Yes_Run_Summary if DAY(TODAY()) = 1 OR RunNow boolean is True

- Get Records: Get_Donations_This_Month
    * Object: Donation__c
    * Condition: Donation_Date__c equals THIS_MONTH (or use date range variables StartOfPrevMonth/EndOfPrevMonth depending on design)
    * How Many: All records; Store: All fields

- Loop: Loop_Donations (iterate Get_Donations_This_Month collection)

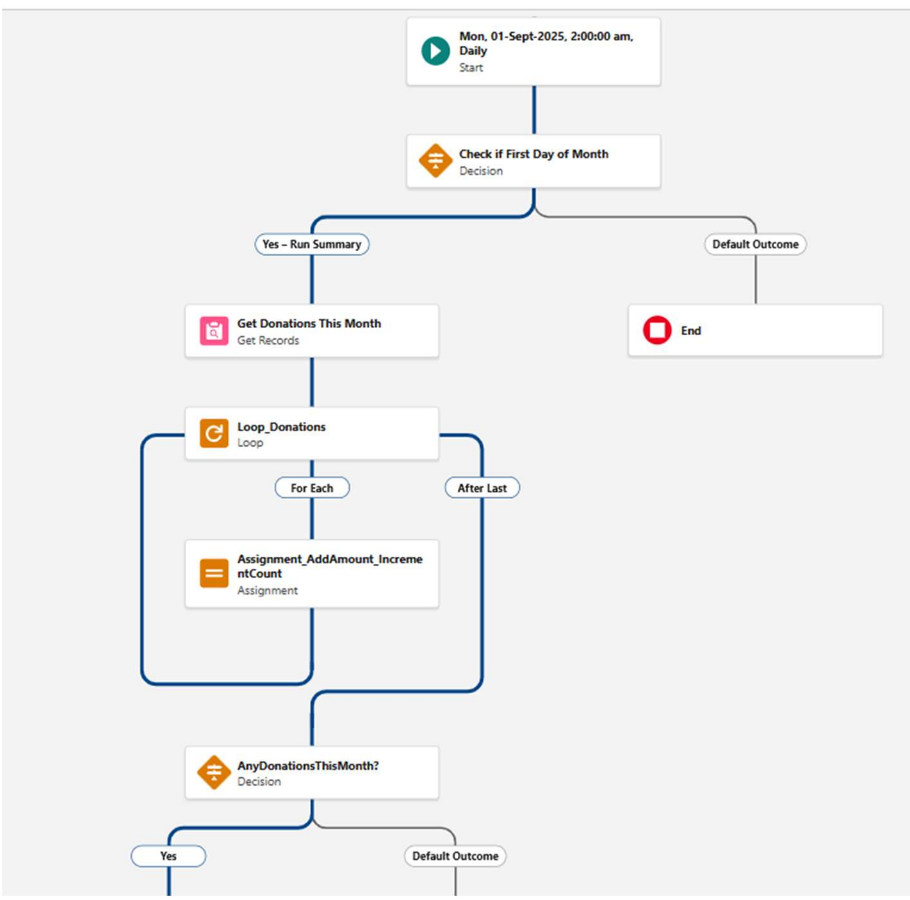
- Assignment element inside loop: Assignment_AddAmount_IncrementCount
    * TotalAmount = TotalAmount + {!Loop_Donations.Amount__c}
    * DonationCount = DonationCount + 1

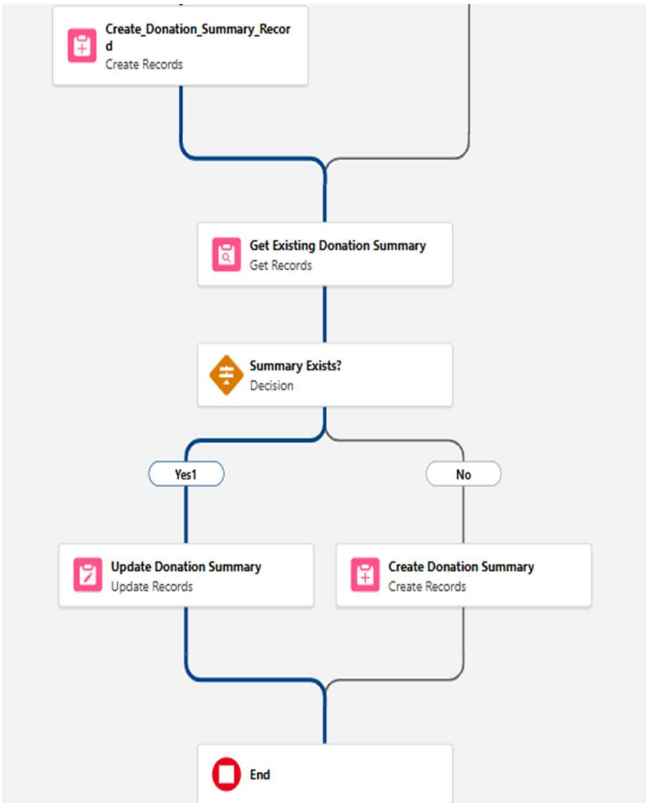
- After loop: Get Records: Get_Existing_Donation_Summary
  * Object: Donation_Summary__c
  * Condition: Month__c equals {!MonthYearText} (or {!date} depending on naming)
  * How many: Only the first record (we check existence)

- Decision: Summary Exists?
  * Yes path -> Update Donation Summary
    - Update record (where Id = {!Get_Existing_Donation_Summary.Id}) set:
      Total_Amount__c = {!TotalAmount}
      Total_Donations__c = {!DonationCount}

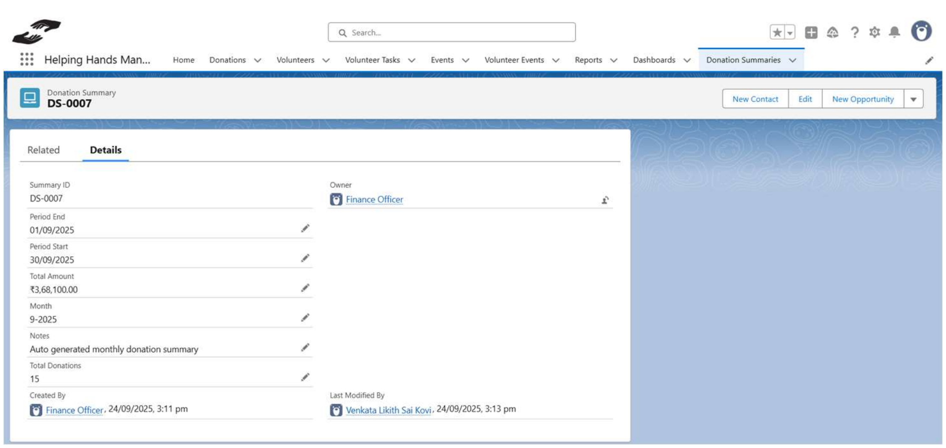
* No path -> Create Donation Summary
    - Create record Donation_Summary__c with fields:
      Month__c = {!MonthYearText}
      Total_Amount__c = {!TotalAmount}
      Total_Donations__c = {!DonationCount}

6. Save as 'Monthly Donation Summary (Daily Check)' and Activate.





Test examples & debug steps :
• Created test donations for Sept-2025 (various amounts) and ran Debug with RunNow = True to bypass date check.
• Observed Debug log showing Decision 'Summary Exists?' = Yes and Update path executed.
• Debug outputs showed values: TotalAmount = 3,21,100.00; DonationCount = 12 (example run). Later run produced TotalAmount = 3,68,100.00; DonationCount = 15.
• Important: Debug default runs in rollback mode; uncheck 'Run flow in rollback mode' to persist changes.



Step 6: Reports & Dashboards — Detailed Build

Objective: Provide Finance and Executive stakeholders with actionable visuals summarizing donations, donors, and volunteer contributions.

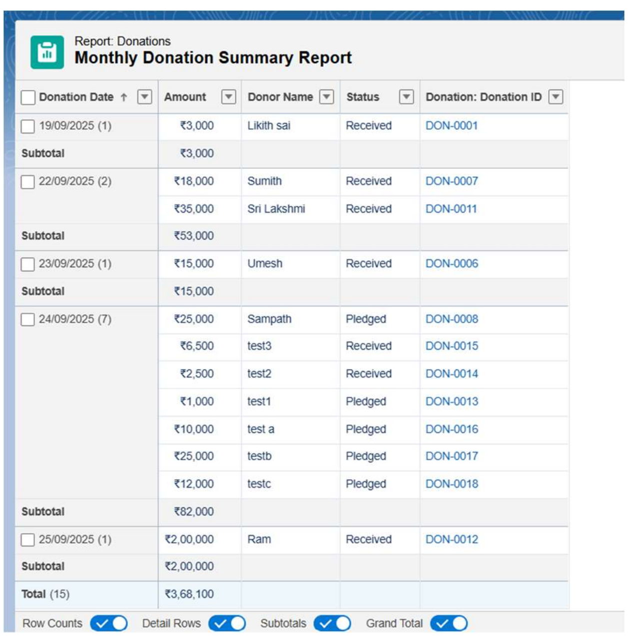
Report : Monthly Donation Summary Report (detailed build):

1. App Launcher → Reports → New Report.

2. Select Report Type: Donations (Donation__c) → Continue.

3. In the Report Builder:
   - Add Columns: Donation ID (Name), Donor_Name__c, Amount__c, Donation_Date__c, Linked_Volunteer__c, Payment_Method__c, Status__c
   - Filters: Date Range = This Year (or All Time for historical). Remove default 'My Donations'.
   - Group Rows by: Calendar Month (Donation Date) -> To do this: click Add Group -> Donation Date -> select 'Calendar Month'
   - Summaries: click the chevron on Amount__c -> Summarize -> Sum. Also add Row Count for number of donations.
   - Optional: add filter Status__c = Received to show only completed donations.

4. Save Report Name: Monthly Donation Summary Report. Folder: Helping Hands Reports.



Report: Donations
Monthly Donation Summary Report

Donation Date	Amount	Donor Name	Status	Donation: Donation ID
19/09/2025 (1)	₹3,000	Likith sai	Received	DON-0001
Subtotal	₹3,000			
22/09/2025 (2)	₹18,000	Sumith	Received	DON-0007
	₹35,000	Sri Lakshmi	Received	DON-0011
Subtotal	₹53,000			
23/09/2025 (1)	₹15,000	Umesh	Received	DON-0006
Subtotal	₹15,000			
24/09/2025 (7)	₹25,000	Sampath	Pledged	DON-0008
	₹6,500	test3	Received	DON-0015
	₹2,500	test2	Received	DON-0014
	₹1,000	test1	Pledged	DON-0013
	₹10,000	test a	Pledged	DON-0016
	₹25,000	testb	Pledged	DON-0017
	₹12,000	testc	Pledged	DON-0018
Subtotal	₹82,000			
25/09/2025 (1)	₹2,00,000	Ram	Received	DON-0012
Subtotal	₹2,00,000			
Total (15)	₹3,68,100			

Row Counts Detail Rows Subtotals Grand Total

Dashboard: **2025-September Month Donation Dashboard**

1. App Launcher → Dashboards → New Dashboard.

2. Name: Helping Hands Donation Dashboard. Folder: Helping Hands Reports.

3. Add Components:
   - Component 1: Bar Chart -> Source report: Monthly Donation Summary Report -> X-axis: Month, Y-axis: Sum of Amount
   - Component 2: Donut/Pie -> Source report: Donations by Payment Method (create an ad-hoc report grouped by Payment_Method__c)
   - Component 3: Metric tile -> Source report: Monthly Donation Summary -> configure to show total for current month
   - Component 4: Table -> Top 10 donors by amount (create a report that sorts Amount desc and limit to 10)

4. Configure component titles, display units, and filters as needed.

5. Save Dashboard and share folder permissions with Finance Officer and Admins.