

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 \geq ₹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:
 $\text{Amount_c} \leq 0$
 - Error Message: Donation amount must be greater than 0.
 - Error Location: Field → Amount

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

Donation Validation Rule Help for this Page

[Back to Donation](#)

Validation Rule Detail Edit Clone

Rule Name	Donation_Amount_Positive	Active	✓
Error Condition Formula	Amount__c <= 0		
Error Message	Donation Amount must be greater than 0.	Error Location	Amount
Description	Ensure donation amount is positive		
Created By	Venkata Likith Sai Kovi 20/09/2025, 7:46 pm	Modified By	Venkata Likith Sai Kovi 22/09/2025, 9:48 am

Edit Clone

Test case :

- Create a Donation record with Amount = -1
- Attempt to save
- Expected Result: Validation error displayed near the Amount field.

New Donation: one-time

* = Required Information

Information

Donation ID

Owner
Venkata Likith Sai Kovi

* Amount
-₹1
Donation Amount must be greater than 0.

* Donation Date
14/09/2025

* Donor Name
vivek

* Donor Email
vivek@gmail.com

* Payment Method
Cash

* Status

⊗ We hit a snag.
Review the following fields
• [Amount](#)

⊗ Cancel Save & New Save

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.

The screenshot displays the Salesforce Flow Builder interface for a flow named "Auto Assign Orientation Task - V3". The flow is configured as a Record-Triggered Flow with the following settings:

- Object:** Volunteer
- Trigger:** A record is created
- Conditions:** 1
- Optimize for:** Actions and Related Records

The flow diagram shows a "Run Immediately" start node followed by a "Create Orientation Task" element (Create Records) and an "End" node.

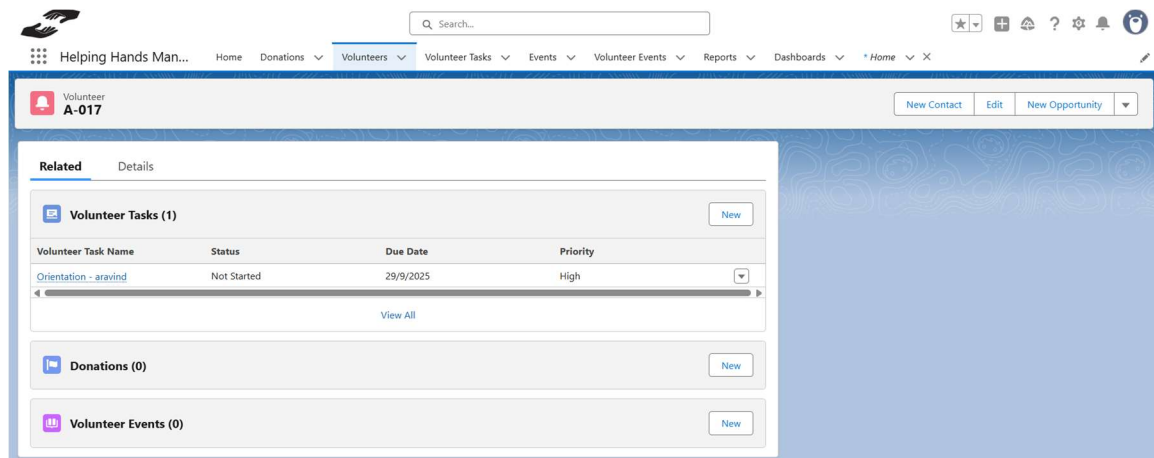
The "Create Records" element is configured with the following field values for the VolunteerTask__c record:

Field	Value
Due Date	due date
Volunteer Task Name	Orientation - {!\$Record.Volunteer_Name__c}
Priority	High
Status	Not Started
Volunteer	Triggering Volunteer__c > Record ID
Event	Triggering Volunteer__c > Event

Additional options include "Manually assign variables (advanced)" (unchecked) and "Check for Matching Records" (disabled).

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).

Email Template

Large_Donation_Alert

Edit

Clone

Delete

Details

Related

Information

Email Template Name

Large_Donation_Alert

Related Entity Type

Description

Folder

Helping Hands Project

Made in Email Template Builder

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Message Content

Subject

{{Donation__c.Donor_Name__c}} - {{Donation__c.Amount__c}}

Enhanced Letterhead

HTML Value

Subject: {{Donation__c.Donor_Name__c}} - {{Donation__c.Amount__c}}

Hello Finance Team,

A donation of {{Donation__c.Amount__c}} (Donation ID: {{Donation__c.Name}}) was received on {{Donation__c.Donation_Date__c}} by {{Donation__c.Donor_Name__c}}.

Linked Volunteer: {{Donation__c.Linked_Volunteer__c}}

Please review and take necessary action.

Thanks,

Helping Hands Management

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

Email Alert

Alert message in Large_Donation_To_Finance

Rules Using This Email Alert

Approval Processes Using This Email Alert

Entitlement Processes Using This Email Alert

Help for this Page

Email Alert Detail

Edit

Delete

Clone

Description

Alert message in Large_Donation_To_Finance

Email Template

Large_Donation_Alert

Unique Name

Alert_Large_Donation_To_Finance

Object

Donation

From Email Address

Default Workflow User's email address

Recipients

User: Finance Officer
User: Venkata Laksh Sai Kori
User: Donation Manager

Additional Emails

sai.korim511@gmail.com

Created By

Venkata Laksh Sai Kori

20/09/2025, 10:51 pm

Modified By

Venkata Laksh Sai Kori

23/09/2025, 10:55 pm

Edit

Delete

Clone

Rules Using This Email Alert

This alert is currently not used by any rules

Rules Using This Email Alert help

Approval Processes Using This Email Alert

This alert is currently not used by any approval processes

Approval Processes Using This Email Alert help

Entitlement Processes Using This Email Alert

This alert is currently not used by any entitlement processes

Flows Using This Email Alert

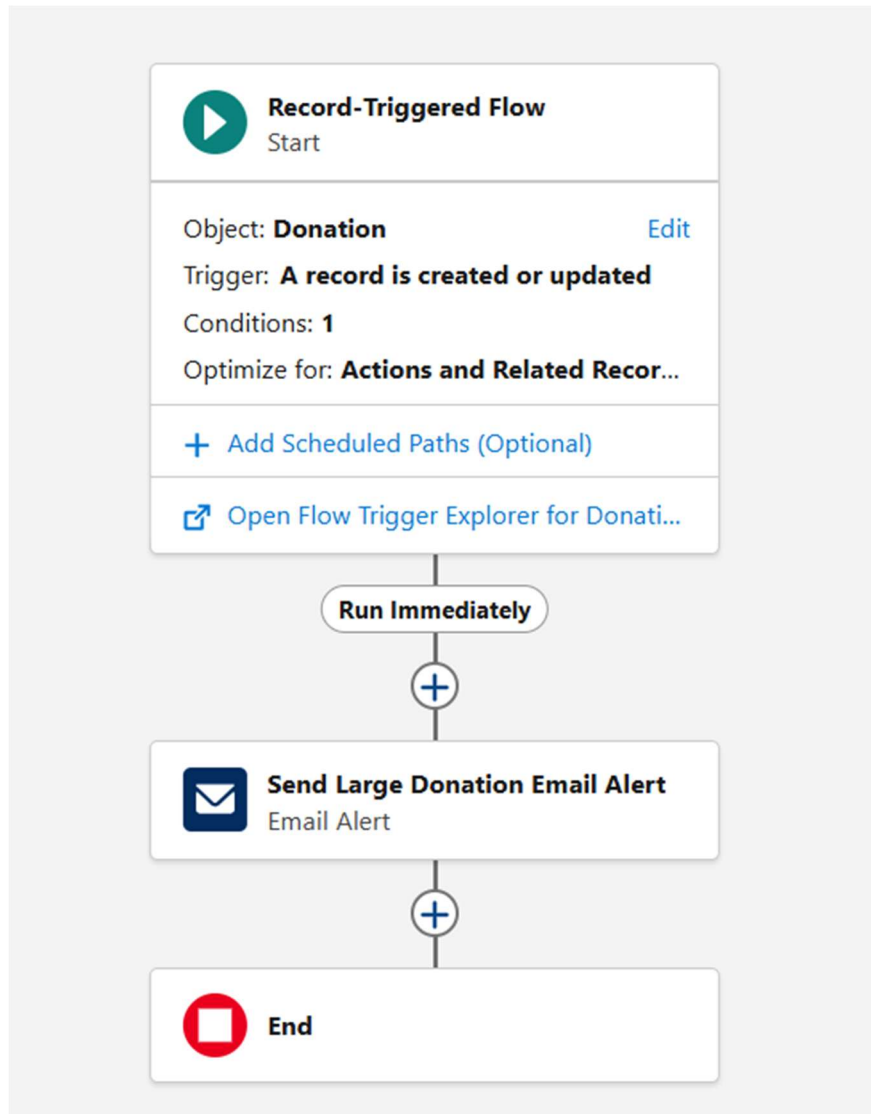
Flow Name	Version	Description	Object	Active
Notify_Finance_on_Large_Donation	1.2		011gK000002K5R	<input checked="" type="checkbox"/>

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.

<div> <div>  <div> Donation DON-0011 </div> </div> </div>	
Related	Details
<div> <div>Donation ID</div> <div>DON-0011</div> </div>	<div> <div>Owner</div> <div>  Venkata Likith Sai Kovi </div> </div>
<div> <div>Amount</div> <div>₹35,000</div> </div>	
<div> <div>Donation Date</div> <div>22/09/2025</div> </div>	
<div> <div>Donor Name</div> <div>Sri Lakshmi</div> </div>	
<div> <div>Donor Email</div> <div>srilakshmi@gmail.com</div> </div>	
<div> <div>Payment Method</div> <div>Card</div> </div>	
<div> <div>Status</div> <div>Received</div> </div>	
<div> <div>Linked Volunteer</div> <div>A-017</div> </div>	
<div> <div>Notes</div> <div></div> </div>	
<div> <div>Linked Event</div> <div>A-0001</div> </div>	
<div> <div>Created By</div> <div>  Venkata Likith Sai Kovi, 23/09/2025, 11:28 pm </div> </div>	<div> <div>Last Modified By</div> <div>  Venkata Likith Sai Kovi, 23/09/2025, 11:28 pm </div> </div>

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1 of 8,217

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Sri Lakshmi - ₹35,000

Inbox x

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Summarise this email

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Finance Officer

via h5hh4dc2zvbljjgk-7ydv7uao.can96.bnc.salesforce.com

to me, sailikith57@gmail.com

Subject: Sri Lakshmi - ₹35,000

23:28 (0 minutes ago)

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Hello Finance Team,

A donation of ₹35,000 (Donation ID: DON-0011) was received on 22/09/2025 by Sri Lakshmi. Linked Volunteer: A-017

Please review and take necessary action.

Thanks,

Helping Hands Management

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.

The screenshot shows the 'Approval Processes' setup page in Salesforce. The process is named 'Large Donation Approval' and is active. The entry criteria is 'Amount__c >= 100000'. The initial submission actions include a 'Record Lock' action. The approval steps include a 'High Value Donation Approval Step' with the criteria 'Amount__c >= 100000, else Approve' and an assigned approver of 'User: Finance Officer'. The final approval action is 'Mark Donation as Approved' and the final rejection action is 'Mark Donation as Rejected'.

Process Name	Large Donation Approval
Unique Name	Large_Donation_Approval
Description	Approval process for Donations requiring admin approval when amount exceeds 1,00,000.
Entry Criteria	Amount__c >= 100000
Record Editability	Administrator ONLY
Approval Assignment Email Template	
Initial Submitters	Donation Owner
Created By	Yashraj Lathia
Modified By	Yashraj Lathia

Action	Type	Description
Record Lock		Lock the record from being edited

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
High Value Donation Approval Step	1		Approves donations of ₹100,000 or more	Amount__c >= 100000, else Approve	User: Finance Officer	Final Rejection

Action	Type	Description
Record Lock		Lock the record from being edited
Field Update		Mark Donation as Approved

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

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.

The screenshot shows an email from 'Finance Officer' to 'saillikith511@gmail.com'. The subject is 'Ram - ₹2,00,000'. The email content mentions a donation of ₹2,00,000 received on 25/09/2025 by Ram, linked volunteer A-002, and requests a review and necessary action.

Ram - ₹2,00,000 Inbox x

Finance Officer via y7s6w7yxowwbqm.gk-7ydv7uao.can96.bnc.salesforce.com to saillikith511@gmail.com, me

Subject: Ram - ₹2,00,000

Hello Finance Team,

A donation of ₹2,00,000 (Donation ID: DON-0012) was received on 25/09/2025 by Ram. Linked Volunteer: A-002

Please review and take necessary action.

Thanks,
Helping Hands Management

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:

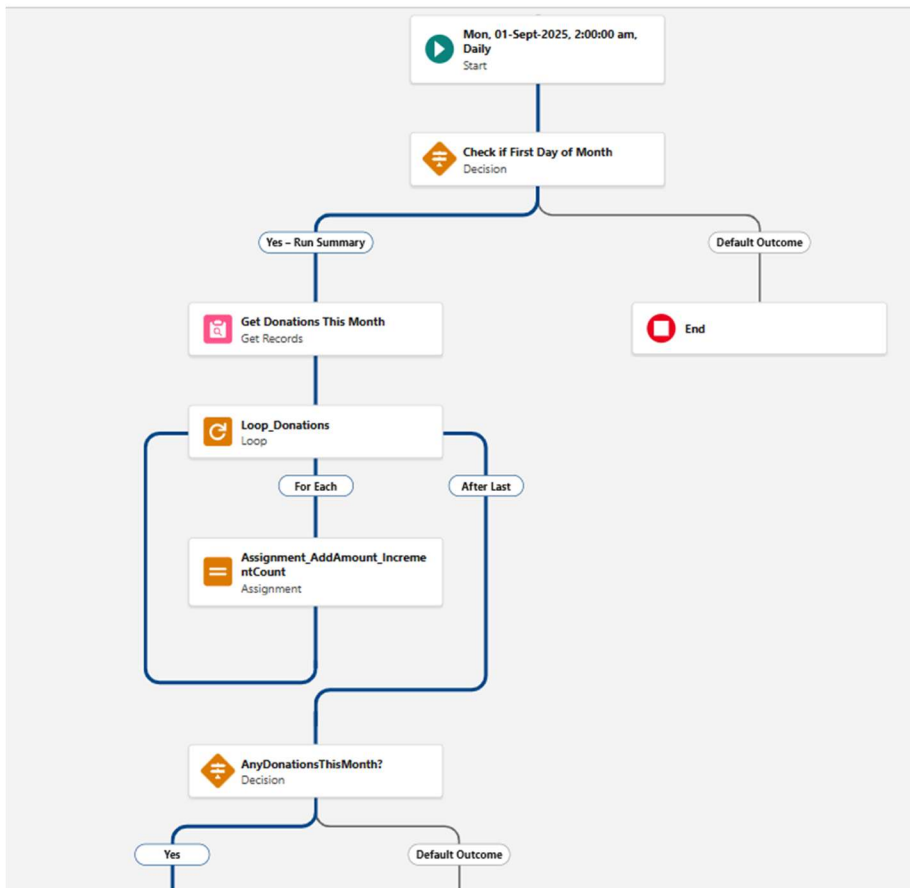
- Variable: TotalAmount (Number, scale 2, default 0)
- Variable: DonationCount (Number, scale 0, default 0)
- Formula: MonthYearText (Text) = TEXT(MONTH(TODAY())) & "-" & TEXT(YEAR(TODAY()))
- Formula (IsFirstOfMonth) or Decision: DAY(TODAY()) = 1

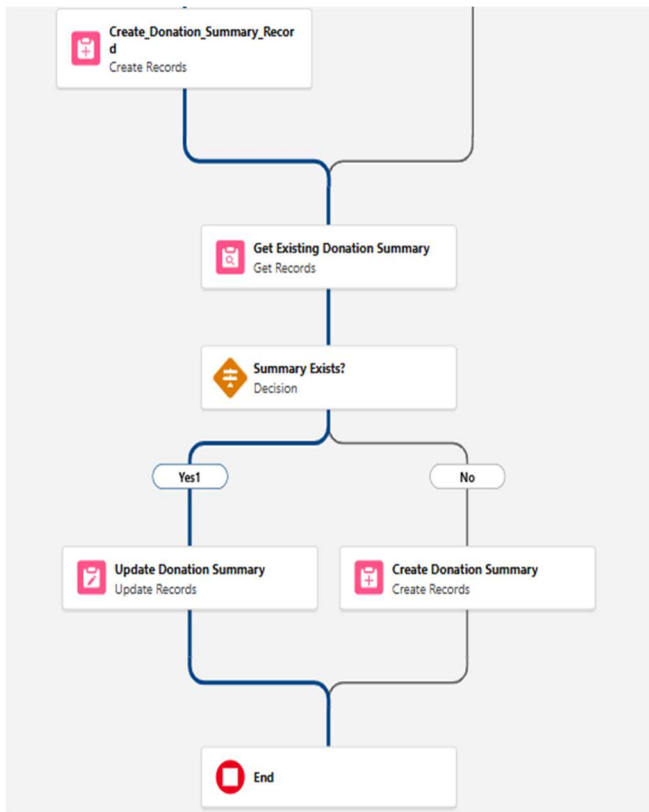
4. Schedule: Start Date = (for testing) 24-Sep-2025; Frequency = Daily; Start Time = as selected

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.

The screenshot shows the 'Donation Summary' form (DS-0007) in a web application. The form is titled 'Donation Summary DS-0007' and has buttons for 'New Contact', 'Edit', and 'New Opportunity'. The 'Details' tab is active, showing the following information:

Related	
Summary ID	DS-0007
Owner	Finance Officer
Period End	01/09/2025
Period Start	30/09/2025
Total Amount	₹3,68,100.00
Months	9-2025
Notes	Auto generated monthly donation summary
Total Donations	15
Created By	Finance Officer - 24/09/2025, 3:11 pm
Last Modified By	Venkata Likith Sai Kovi - 24/09/2025, 3:13 pm

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.

<input type="checkbox"/> Donation Date ▾	<input type="checkbox"/> Amount ▾	<input type="checkbox"/> Donor Name ▾	<input type="checkbox"/> Status ▾	<input type="checkbox"/> Donation: Donation ID ▾
<input type="checkbox"/> 19/09/2025 (1)	₹3,000	Likith sai	Received	DON-0001
Subtotal	₹3,000			
<input type="checkbox"/> 22/09/2025 (2)	₹18,000	Sumith	Received	DON-0007
	₹35,000	Sri Lakshmi	Received	DON-0011
Subtotal	₹53,000			
<input type="checkbox"/> 23/09/2025 (1)	₹15,000	Umesh	Received	DON-0006
Subtotal	₹15,000			
<input type="checkbox"/> 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			
<input type="checkbox"/> 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.

