Phase 4 – Process Automation (Admin) Documentation

Project: Event Management Portal – Salesforce CRM
Objective: Automate routine processes, enforce business rules, and improve efficiency in managing Tickets and Events.
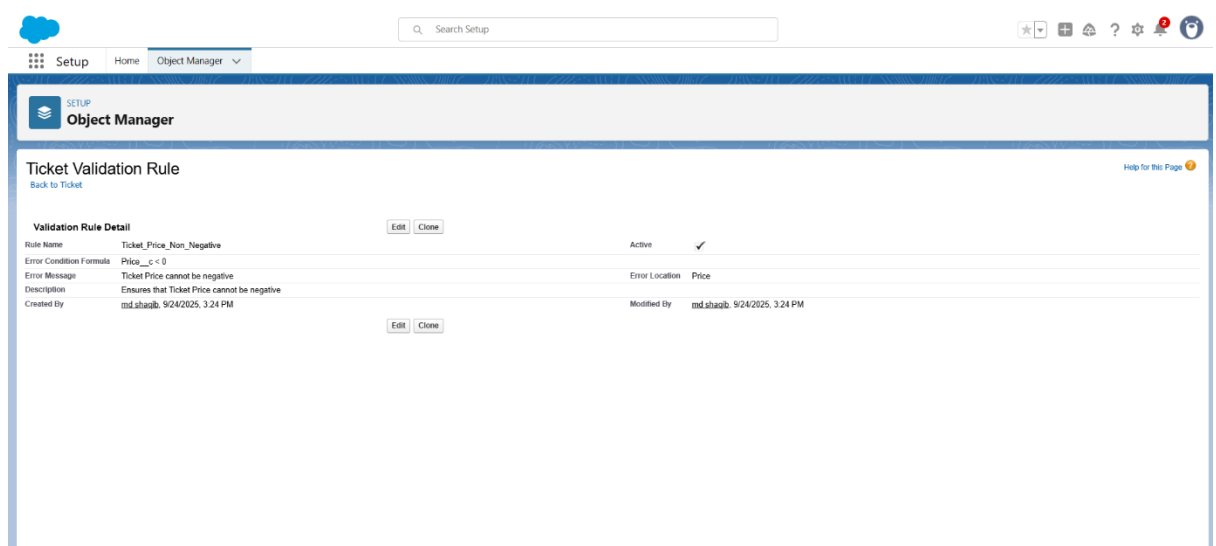
---

1. Validation Rules

Object	Rule Name	Description	Formula	Error Message
Ticket	Ticket_Price_Non_Negative	Ensure Ticket Price is not negative	Price__c < 0	Ticket Price cannot be negative
Event	Event_Date_Not_Past	Ensure Event Date is not in the past	Event_Date__c < TODAY()	Event Date cannot be in the past

Notes:

- Validation rules prevent incorrect data entry.
- Only Ticket and Event require validation rules for this project.

Screenshots for Validation Rules:

- ## For ticket object :

#Hitting error on negative value check:

#For Event object :

2 Record-Triggered Flow (Replacing Workflow Rules)

2.1 Flow: Ticket Booking Automation

Element	Type	Description	Configuration / Value
Start	Record-Triggered Flow	Trigger when Ticket is created/updated	Object: Ticket; Trigger: When record is created or updated; Condition: ISPICKVAL(Status__c, "Booked")
Action	Send Email Alert	Sends confirmation to Attendee	Email Alert: Notify attendee when ticket is booked; Record ID: Triggering Ticket__c > Ticket ID
Action	Update Records	Update Ticket Status automatically	Field: Status → Value: Booked; Record: Triggering Ticket

Notes:

- Workflow Rules are replaced by **Flows** in the new Salesforce version.

- Email alert uses the **Ticket Email field** as recipient.

Screenshots for Flow:

2.2 Email Alert Configuration

Field	Value / Setting
Description	Notify attendee when ticket is booked
Unique Name	Notify_attendee_when_ticket_is_booked
Object	Ticket
Email Template	Ticket Booked Notification
Recipient Type	Email Field
Recipient	Email Field: Email
From Email	Current User (default)

Notes:

- Uses **merge fields** from Ticket object for dynamic email content.

- Sends email when Ticket Status = Booked.

Screenshots for Email Alert:

2.3 Email Template (Custom, without Classic Letterhead)

Field	Value
Template Name	Ticket_Confirmation_Email
Template Unique Name	Ticket_Confirmation_Email
Encoding	UTF-8
Description	Sends a confirmation email to Attendee
Subject	Your Ticket for {!Ticket__c.Event_record__c} is Confirmed
Folder	Unfiled Public Classic Email Templates
Available For Use	☑ Checked
Email Body	Hello {!Ticket__c.Attendee_Name__c}, Your ticket for {!Ticket__c.Event_record__c} has been booked. Event Date: {!Ticket__c.Event_Date__c} Ticket Price: {!Ticket__c.Price__c} Thank you!

Notes:

- Merge fields populate Ticket-specific information dynamically.

- Email template linked in Flow Email Alert.

Screenshots for Email Template:
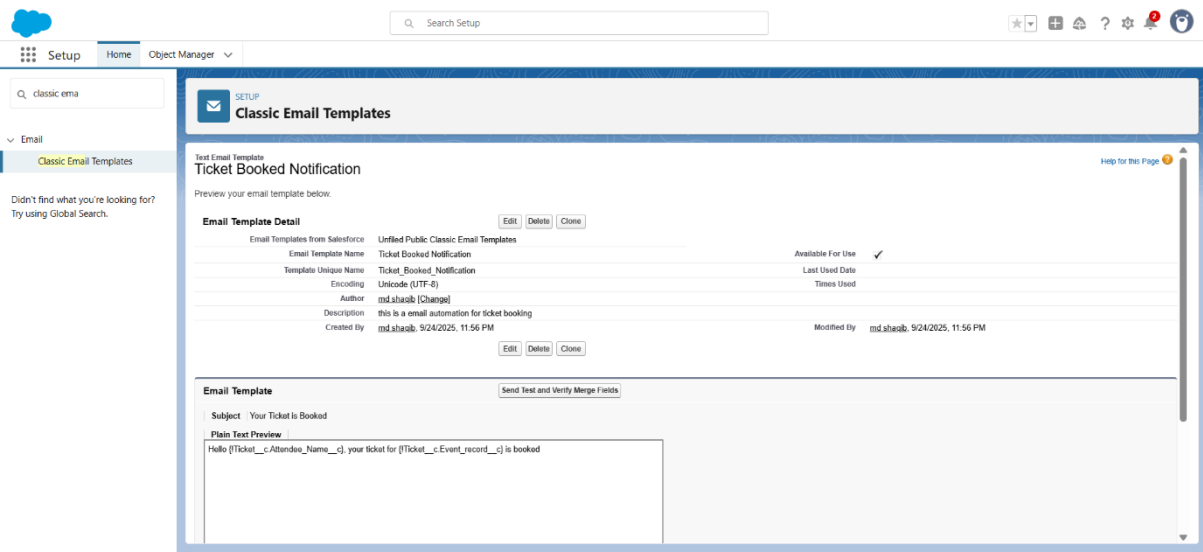
3.Field Updates in Flow

Element	Object	Field Updated	Value
Update Ticket Status	Ticket	Status__c	Booked

Notes:

- Automatically sets Ticket Status to Booked when flow triggers.

- Ensures data consistency without manual updates.

Screenshots for Field Update: