

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

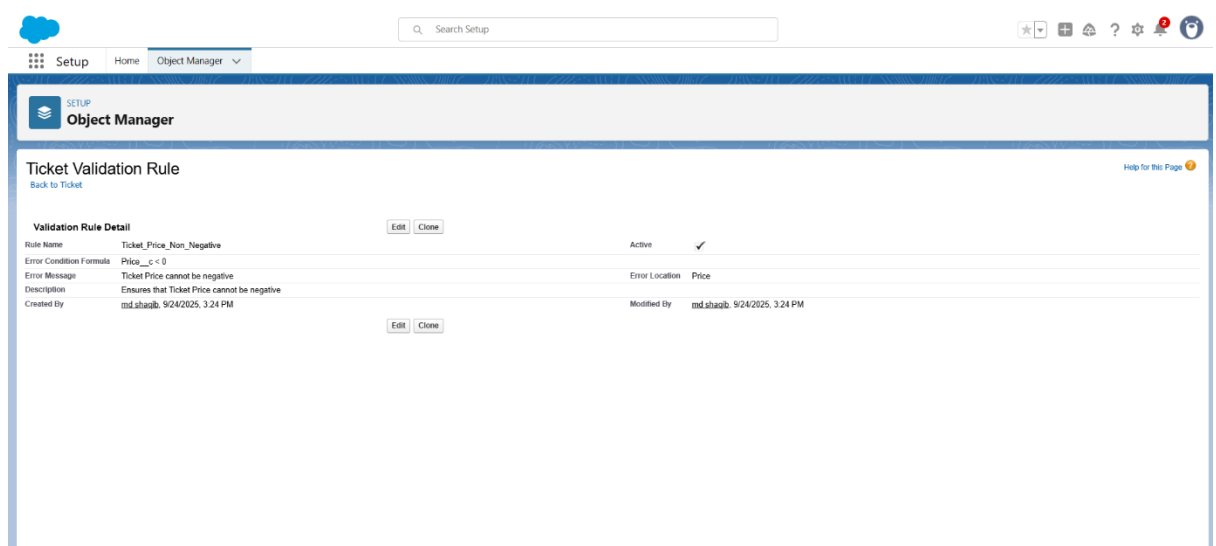
Object	Rule Name	Description	Formula	Error Message
Ticket	Ticket_Price_Non_Negative	Ensure Ticket Price is not negative	Price__c < 0	Ticket Price cannot be negative
Event	Event_Date_Not_Past	Ensure Event Date is not in the past	Event_Date__c < TODAY()	Event Date cannot be in the past

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:

The screenshot shows a 'New Ticket' form in a CRM system. The form is titled 'New Ticket' and has a 'Required Information' section. The fields are as follows:

- Ticket Name: dubai ticket
- Ticket ID: (empty)
- Price: -\$10 (highlighted with a red border and a red error message: 'Ticket Price cannot be negative')
- Attendee Name: md shaqib
- Email: md.shaqib@gmail.com
- Status: Checked-in
- Event record: consent

A red error message box is displayed over the form, stating: 'We hit a snag. Review the following fields' with a link to 'Price'. The form has buttons for 'Cancel', 'Save & New', and 'Save'.

#For Event object :

The screenshot shows the 'Event record Validation Rule' in the 'Object Manager' setup page. The rule is titled 'Event record Validation Rule' and is active. The details are as follows:

Validation Rule Detail	
Rule Name	Event_Date_Not_Past
Error Condition Formula	Event_Date__c < TODAY()
Error Message	Event Date cannot be in the past.
Description	Ensures that Event Date cannot be in the past.
Created By	md.shaqib, 9/24/2023, 3:58 PM

The rule is active, as indicated by the 'Active' checkbox being checked. The 'Error Location' is 'Event Date'. The 'Modified By' is 'md.shaqib, 9/24/2023, 3:58 PM'.

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:

The screenshot displays the Salesforce Flow Builder interface for a flow named "Ticket Booking Flow - V1". The flow is a Record-Triggered Flow that starts when a Ticket record is created or updated, with the condition "ISPICKVAL(Status__c, 'Booked')". The flow consists of three main steps: "Run Immediately", "Send Ticket Booked... Email Alert", and "Update Ticket Status". The "Send Ticket Booked... Email Alert" step is highlighted, and its configuration is shown on the right. The configuration includes a label "Notify attendee when ticket is booked", an API Name "Send_Ticket_Booked_Email", and a description "Sends email to the attendee when Ticket Status = Booked". The input values for the email alert are set to "Record ID" and "Triggering Ticket__c > Ticket ID". The flow ends with an "End" step.

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:

The screenshot shows the Salesforce Setup interface for configuring an Email Alert. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area is titled 'Email Alerts' and displays the configuration for the 'Notify attendee when ticket is booked' alert. The configuration details include:

- Email Alert Detail:** Edit, Delete, Clone buttons.
- Description:** Notify attendee when ticket is booked
- Unique Name:** Notify_attendee_when_ticket_is_booked
- From Email Address:** Current User's email address
- Recipients:** Email Field: Email
- Additional Emails:** md.shaqib.cs22@gmails.net
- Created By:** md.shaqib, 9/25/2025, 12:17 AM
- Modified By:** md.shaqib, 9/25/2025, 12:17 AM
- Email Template:** Ticket Booked Notification
- Object:** Ticket

Below the configuration details, there are sections for 'Rules Using This Email Alert' and 'Approval Processes Using This Email Alert', both indicating that the alert is currently not used by any rules or processes.

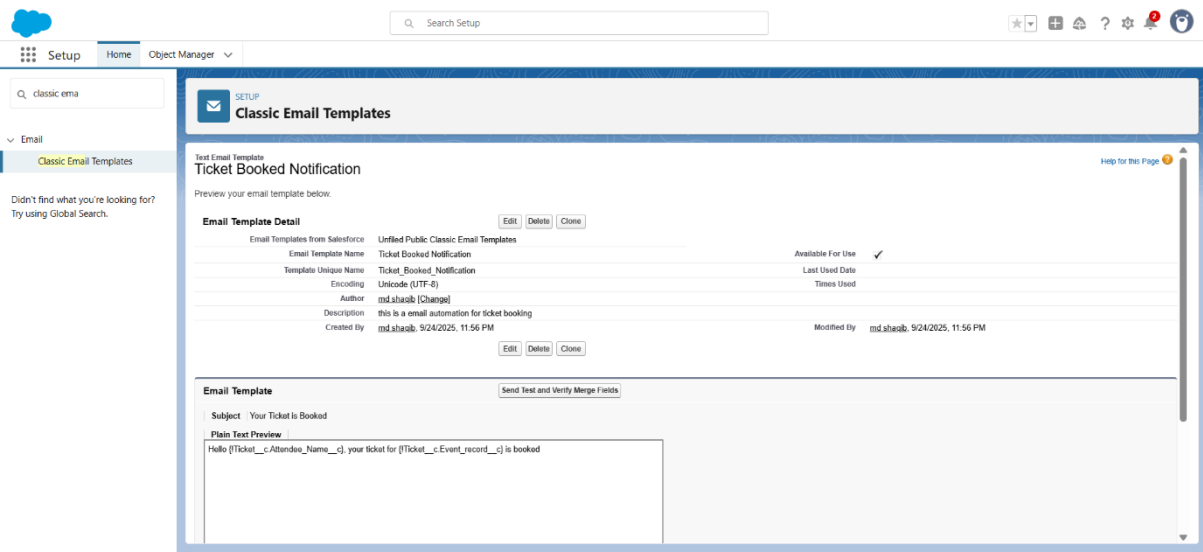
2.3 Email Template (Custom, without Classic Letterhead)

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	<input checked="" type="checkbox"/> 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:

