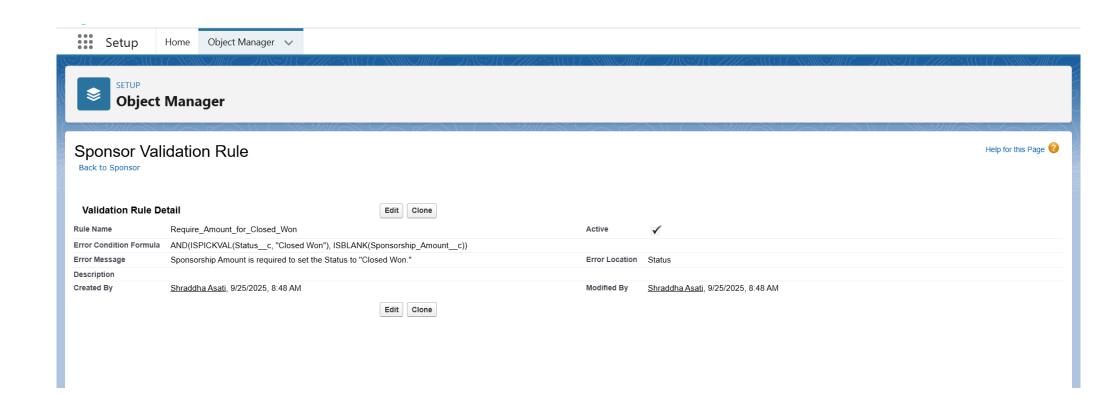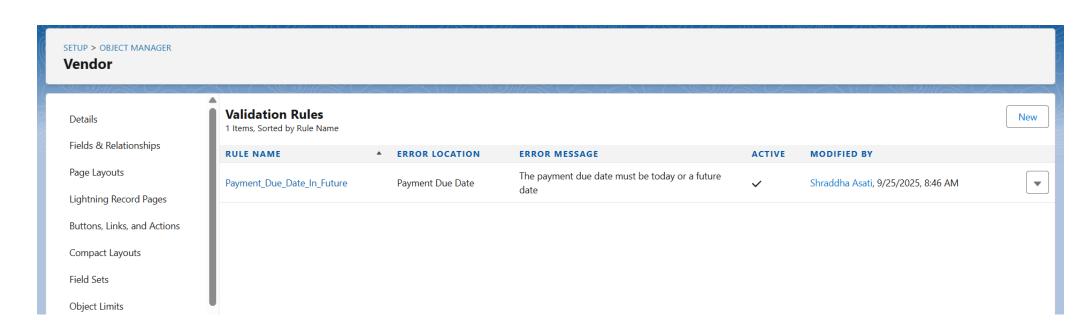# Phase IV: Process Automation
AURA EVENTS & SPONSOR:
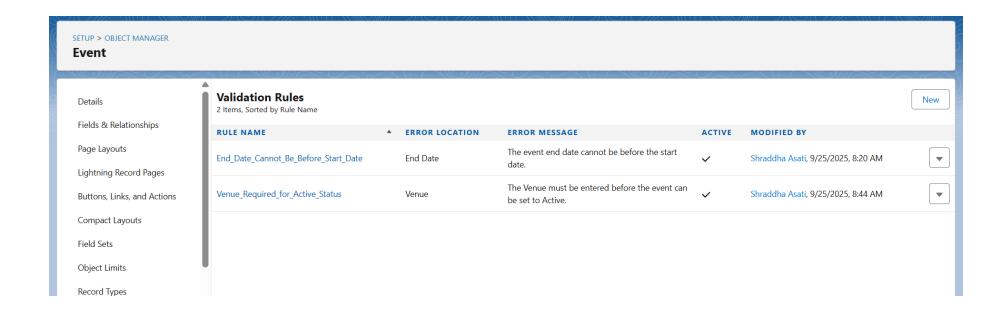# College Events & Sponsor Management

Validation Rules (Data Quality Enforcement)

- **Explanation:** Simple rules were implemented to prevent users from saving bad data, enforcing data integrity at the time of record creation or update.
- **Salesforce Path:** Setup → Object Manager → Select Object → Validation Rules
- **Procedure & Configuration:**
  - **Rule 1 (Date Integrity):** Prevents the End Date from being before the Start Date on the **Event** object.
  - **Rule 2 (Sponsor Finances):** Prevents setting **Sponsor** Status to "Closed Won" if the **Sponsorship Amount** is blank.
  - **Rule 3 (Event Activation):** Prevents setting **Event** Status to "Active" if the **Venue** field is empty.
  - **Rule 4 (Vendor Date):** Prevents entering a **Vendor** Payment Due Date that is in the past.

Setup | Home | Object Manager ∨

SETUP
Object Manager

Sponsor Validation Rule
Back to Sponsor

Help for this Page

Validation Rule Detail   [Edit] [Clone]

Rule Name	Require_Amount_for_Closed_Won		Active	✓
Error Condition Formula	AND(ISPICKVAL(Status__c, "Closed Won"), ISBLANK(Sponsorship_Amount__c))			
Error Message	Sponsorship Amount is required to set the Status to "Closed Won."		Error Location	Status
Description				
Created By	Shraddha Asati, 9/25/2025, 8:48 AM		Modified By	Shraddha Asati, 9/25/2025, 8:48 AM

[Edit] [Clone]

SETUP > OBJECT MANAGER
Vendor

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits

Validation Rules
1 Items, Sorted by Rule Name

[New]

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY	
Payment_Due_Date_In_Future	Payment Due Date	The payment due date must be today or a future date	✓	Shraddha Asati, 9/25/2025, 8:46 AM	▼

Details	**Validation Rules**
Fields & Relationships	2 Items, Sorted by Rule Name
Page Layouts	
Lightning Record Pages	
Buttons, Links, and Actions	
Compact Layouts	
Field Sets	
Object Limits	
Record Types	

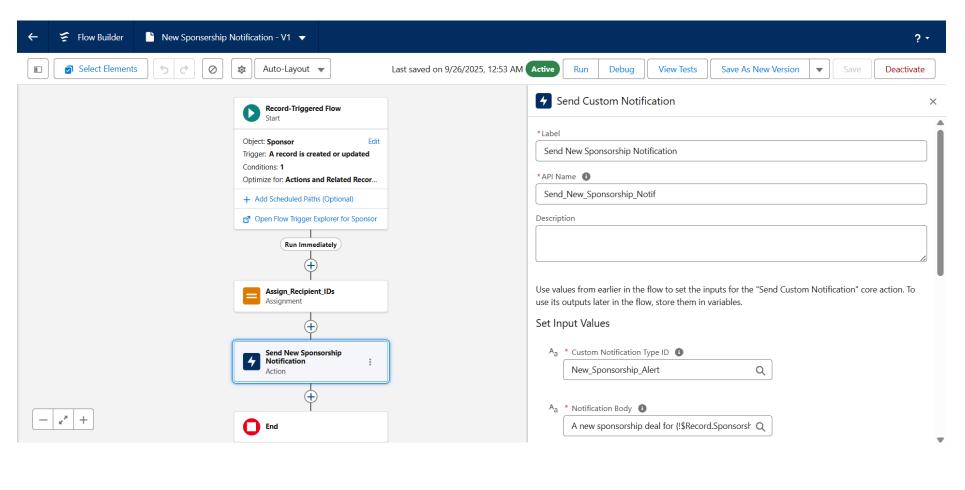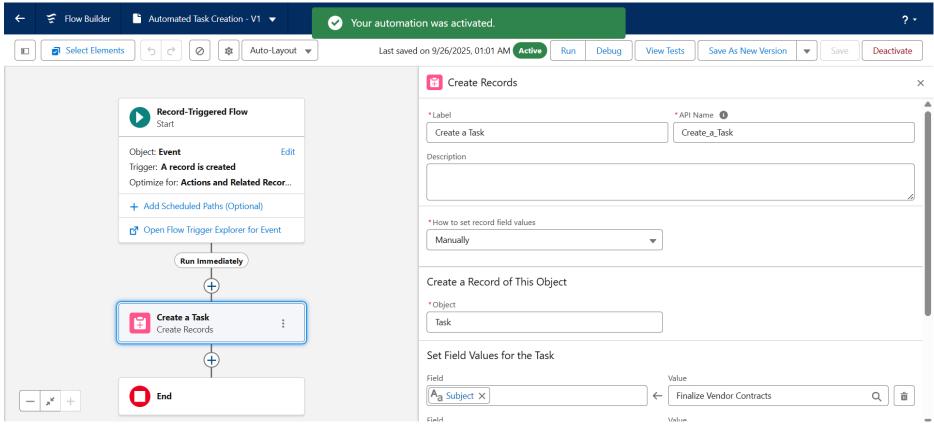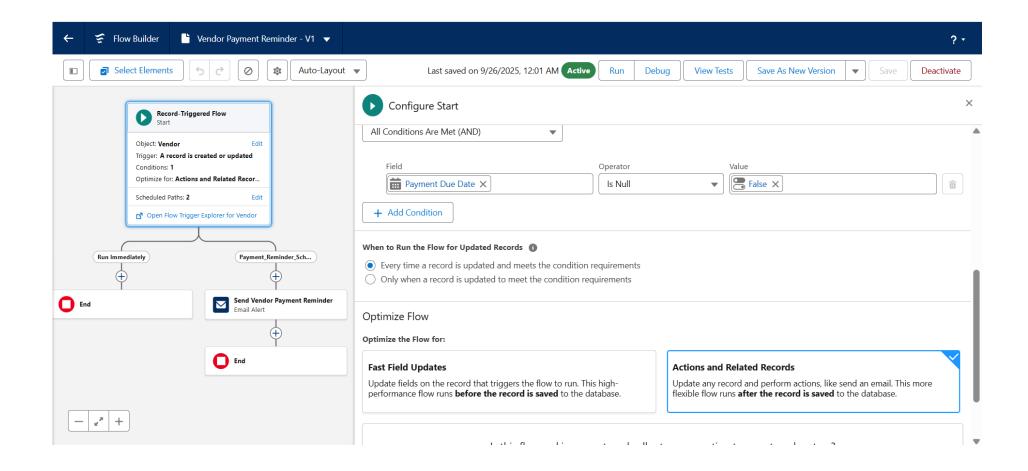| RULE NAME ▲	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY	
End_Date_Cannot_Be_Before_Start_Date	End Date	The event end date cannot be before the start date.	✓	Shraddha Asati, 9/25/2025, 8:20 AM	▼
Venue_Required_for_Active_Status	Venue	The Venue must be entered before the event can be set to Active.	✓	Shraddha Asati, 9/25/2025, 8:44 AM	▼

Flow Builder (Core Business Logic)

- **Explanation:** Flows were built to automate key cross-functional processes, replacing manual steps and managing time-sensitive notifications. **Flow Builder** was used instead of older tools (Workflow Rules, Process Builder).

- **Salesforce Path:** Setup → Quick Find → Flows

- **Procedure & Configuration:**

Flow Name	Type	Object/Trigger	Key Actions
Vendor Payment Reminder	**Record-Triggered (Scheduled Path)**	**Vendor** (Created/Updated)	**Scheduled Path:** Triggers **15 days Before** the Payment_Due_Date__c. **Action:** Calls the pre-configured **Email Alert** to notify the Event Coordinator.
New Sponsorship Notification	**Record-Triggered (Run Immediately)**	**Sponsor** (Updated)	**Entry Criteria:** Status equals "Closed Won." **Action 1 (Assignment):** Gathers OwnerId and Related_Event__r.OwnerId into a collection variable. **Action 2:** Sends a **Custom Notification** with the amount and sponsor name to the collected Recipient IDs.
Automated Task Creation	**Record-Triggered (Run Immediately)**	**Event** (Created)	**Action: Creates a new Task** record with a subject like "Finalize Vendor Contracts" and assigns it to the Event Owner ({!$Record.OwnerId}).

Select Elements | Auto-Layout ▾ | Last saved on 9/26/2025, 12:53 AM | Active | Run | Debug | View Tests | Save As New Version ▾ | Save | Deactivate

Record-Triggered Flow
Start

Object: **Sponsor** — Edit
Trigger: **A record is created or updated**
Conditions: **1**
Optimize for: **Actions and Related Recor...**

+ Add Scheduled Paths (Optional)

⧉ Open Flow Trigger Explorer for Sponsor

Run Immediately
⊕

Assign_Recipient_IDs
Assignment
⊕

Send New Sponsorship Notification
Action
⊕

End

⚡ **Send Custom Notification** ✕

* Label
Send New Sponsorship Notification

* API Name ⓘ
Send_New_Sponsorship_Notif

Description

Use values from earlier in the flow to set the inputs for the "Send Custom Notification" core action. To use its outputs later in the flow, store them in variables.

Set Input Values

Aa * Custom Notification Type ID ⓘ
New_Sponsorship_Alert 🔍

Aa * Notification Body ⓘ
A new sponsorship deal for {!$Record.Sponsorsh 🔍

Select Elements | Auto-Layout ▾ | Last saved on 9/26/2025, 01:01 AM | Active | Run | Debug | View Tests | Save As New Version ▾ | Save | Deactivate

Record-Triggered Flow
Start

Object: **Event** — Edit
Trigger: **A record is created**
Optimize for: **Actions and Related Recor...**

+ Add Scheduled Paths (Optional)

⧉ Open Flow Trigger Explorer for Event

Run Immediately
⊕

Create a Task
Create Records
⊕

End

🖫 **Create Records** ✕

* Label
Create a Task

* API Name ⓘ
Create_a_Task

Description

* How to set record field values
Manually ▾

Create a Record of This Object

* Object
Task

Set Field Values for the Task

Field
Aa Subject ✕

Value
Finalize Vendor Contracts 🔍 🗑

Field | Value

Select Elements | Auto-Layout ▾ | Last saved on 9/26/2025, 12:01 AM | Active | Run | Debug | View Tests | Save As New Version ▾ | Save | Deactivate

Record-Triggered Flow
Start

Object: **Vendor** — Edit
Trigger: **A record is created or updated**
Conditions: **1**
Optimize for: **Actions and Related Recor...**
Scheduled Paths: **2** — Edit

⧉ Open Flow Trigger Explorer for Vendor

Run Immediately   Payment_Reminder_Sch...
⊕   ⊕

End   **Send Vendor Payment Reminder**
                 Email Alert
                 ⊕
                 End

▶ **Configure Start** ✕

All Conditions Are Met (AND) ▾

Field
📅 Payment Due Date ✕

Operator
Is Null

Value
▣ False ✕   🗑

+ Add Condition

When to Run the Flow for Updated Records ⓘ
● Every time a record is updated and meets the condition requirements
○ Only when a record is updated to meet the condition requirements

Optimize Flow

Optimize the Flow for:

Fast Field Updates
Update fields on the record that triggers the flow to run. This high-performance flow runs **before the record is saved** to the database.

Actions and Related Records ✓
Update any record and perform actions, like send an email. This more flexible flow runs **after the record is saved** to the database.
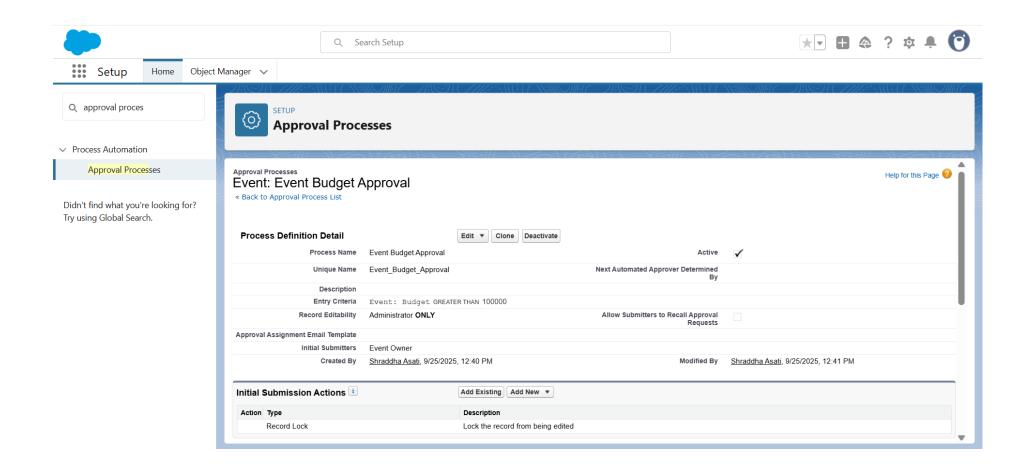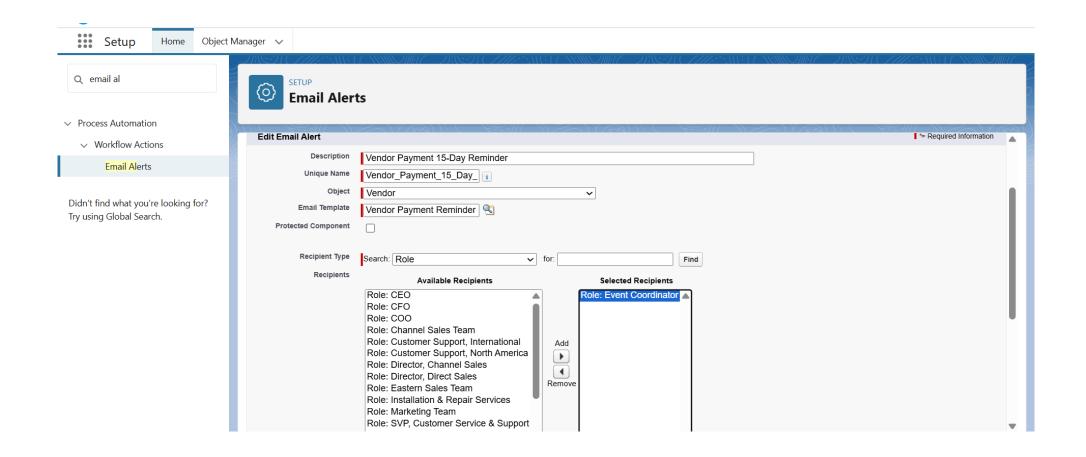
Approval Process (Budget Oversight)

- **Explanation:** A formal approval process was set up to ensure the VP of Event Management reviews and authorizes high-value events.
- **Salesforce Path:** Setup → Quick Find → Approval Processes
- **Procedure & Configuration:**
  - **Object: Event**.
  - **Entry Criteria:** Set to trigger when a condition is met (e.g., Budget is greater than a certain threshold).
  - **Approver Assignment:** Configured to "**Automatically assign to approver(s)**" using the **VP of Event Management Role**.
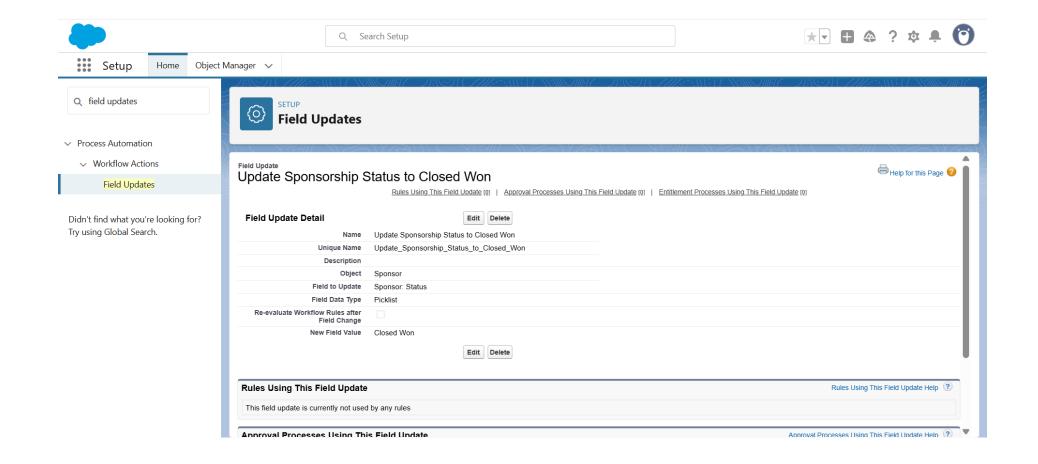
Email Alerts

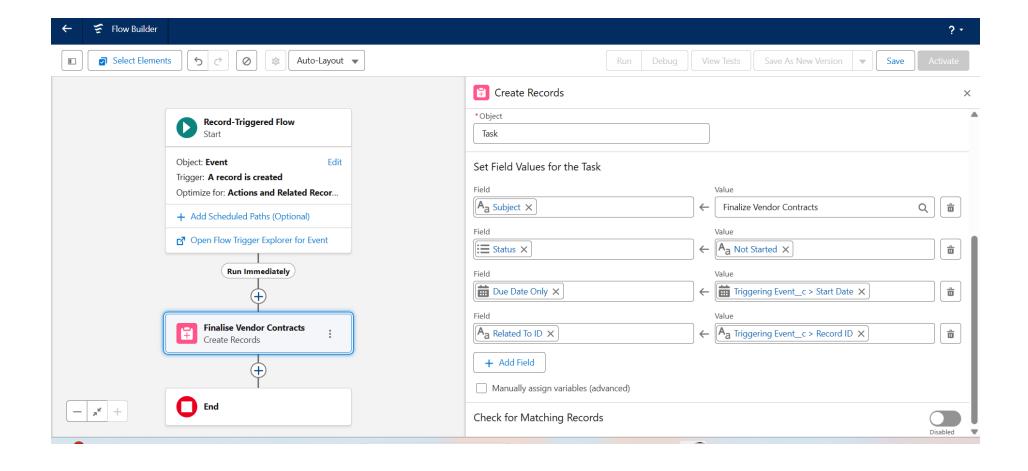| Detail	Description
Explanation	A reusable action component that sends an email using a predefined template. It's configured once and called by any automation tool (Flow, Approval Process).
Salesforce Path	Setup → Quick Find → Email Alerts
Project Example	**Vendor Payment 15-Day Reminder**
Configuration	**Object:** Vendor. **Email Template:** Custom template referencing Vendor fields. **Recipients:** Set to the **Event Coordinator Role**.
Role in Project	Used within the **Vendor Payment Reminder Flow** (Scheduled Path) to send the notification to the coordinator when the payment date is near.

Q email al

∨ Process Automation
  ∨ Workflow Actions
    Email Alerts

Didn't find what you're looking for?
Try using Global Search.

SETUP
Email Alerts

Edit Email Alert   ❙ *= Required Information

Description	Vendor Payment 15-Day Reminder
Unique Name	Vendor_Payment_15_Day_ ⓘ
Object	Vendor
Email Template	Vendor Payment Reminder 🔍
Protected Component	☐

Recipient Type   Search: Role   for: Find

Recipients

Available Recipients

Role: CEO
Role: CFO
Role: COO
Role: Channel Sales Team
Role: Customer Support, International
Role: Customer Support, North America
Role: Director, Channel Sales
Role: Director, Direct Sales
Role: Eastern Sales Team
Role: Installation & Repair Services
Role: Marketing Team
Role: SVP, Customer Service & Support

Add ▶
◀ Remove

Selected Recipients

Role: Event Coordinator

Field Updates

Detail	**Description**
Explanation	A reusable action that automatically modifies the value of a specific field on a record. It ensures data consistency and reduces manual data entry errors.
Salesforce Path	Setup → Quick Find → Field Updates
Project Example	**Update Sponsorship Status to Closed Won**
Configuration	**Object:** Sponsor. **Field to Update:** Status__c. **New Value:** Set to **Closed Won**.
Role in Project	Designed to be used in a future flow that confirms sponsorship status based on an integration or an advanced approval step (e.g., automatically marking the deal as Closed Won once the Sponsorship Amount is entered).

Tasks (Activity Management)

Detail	Description
Explanation	Tasks are standard activity records that track assigned to-do items. In automation, they are created automatically to ensure critical follow-up steps are not missed.
Salesforce Path	Tasks are configured via the **Create Records** action element within **Flow Builder**.
Project Example	**Automated Task Creation** (e.g., "Finalize Vendor Contracts")
Configuration	**Object: Task**. **Field Mapping:** Subject, Status, Due Date, and linking the task back to the original **Event** record via the Related To ID ({!$Record.Id}).
Role in Project	Used in the **Event Creation Flow** to assign the initial setup responsibilities (like hiring vendors) to the event owner immediately after an event record is created.

Custom Notifications

Detail	Description
Explanation	A reusable component that sends alerts directly to a user's **Salesforce Bell Icon** and the mobile app. This is ideal for time-sensitive, in-app alerts.
Salesforce Path	Setup → Quick Find → Custom Notifications
Project Example	**New Sponsorship Alert**
Configuration	**Component:** Defined with a Label and unique API Name (e.g., New_Sponsorship_Alert). **Flow Action:** Used in the **New Sponsorship Notification Flow** by specifying the Notification Body, Notification Title, and a collection of **Recipient IDs** (User IDs from the Sponsorship Manager and Event Coordinator roles).
Role in Project	Used to instantly notify the team (Sponsorship Manager and Event Coordinator) when a high-value sponsorship deal is finalized.

Setup | Home | Object Manager

custom no

∨ Notification Builder

Custom Notifications

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Try using Global Search.

SETUP
Custom Notifications

ℹ When you create and use custom notifications, the title and body of the custom push notification may be saved to and processed by Google, Microsoft and/or Apple. Salesforce is not responsible for the privacy and security practices of third-party systems or applications like Google Cloud Messaging or Apple Push Notification Service.

Custom Notification Types

New

Send custom notifications using Flows or Process Builder

NOTIFICATION NAME	API NAME	NAMESPACE	DESKTOP	MOBILE	
enablement_coaching_feedback_ready	enablement_coaching_feedback_ready		✓		▼
New Sponsorship Alert	New_Sponsorship_Alert		✓	✓	▼