

# Phase 4: Process Automation (Admin)

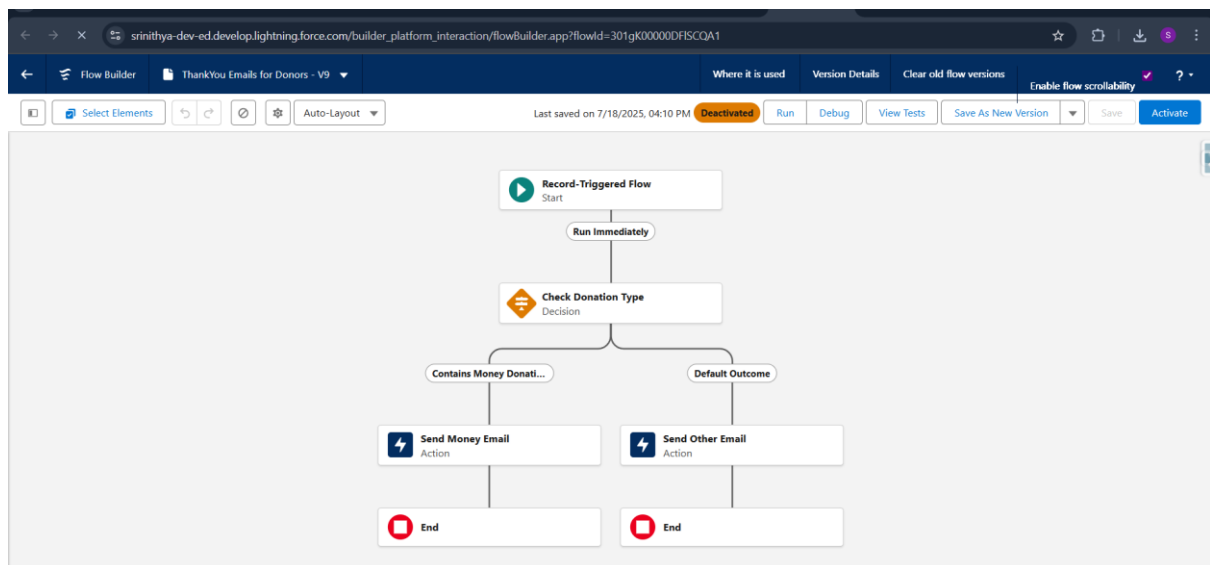
## Objective

To automate repetitive processes in Salesforce using **Flows, Validation Rules, and Email Alerts** — ensuring efficiency, data accuracy, and timely communication without manual intervention.

## Key Automations Implemented

### 1. Thank You Email Automation

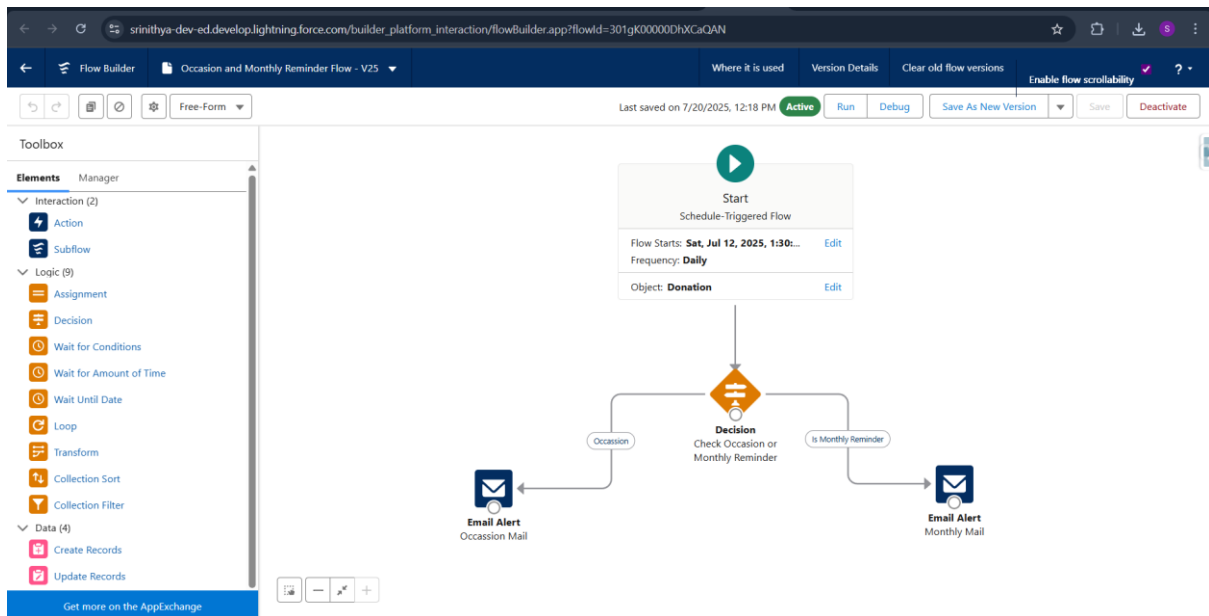
- **Tool:** Record-Triggered Flow
- **Trigger:** When a new Donation record is created
- **Action:** Sends a personalized *Thank You Email* to the donor.
- **Logic:**
  - If Donation Type = "Money" → Attach IT certificate ID in the email.
  - If Donation Type ≠ "Money" → Standard thank-you message.



### 2. Occasion & Monthly Reminder Flow

- **Tool:** Scheduled Flow
- **Trigger:** Runs daily at 8 AM
- **Actions:**
  - Sends birthday/anniversary greetings based on donor's Occasion Date.

- Sends monthly donation reminders for recurring donors who have not donated in the current month.



### 3. Volunteer Acknowledgement & Follow-Up

- **Tool:** Record-Triggered Flow
- **Trigger:** When a Volunteer record is created
- **Actions:**
  - Sends a *Welcome/Acknowledgement Email* immediately.
  - Sends a *Participation Thank You Email* once event completion details are updated.

### Validation Rules for Data Accuracy

1. **Donation Amount Rule** → Must be greater than 0 if Donation Type = "Money".
2. **Email Format Rule** → Must contain "@".
3. **Phone Number Rule** → Must be exactly 10 digits.
4. **Occasion Rule** → Occasion Date is mandatory if Occasion ≠ "None".

### Email Templates & Alerts

- **Thank You – Money Donation** (with IT certificate ID).
- **Thank You – Other Donations** (generic template).

- **Occasion Greetings** (Birthday/Anniversary).
- **Monthly Reminder Email** (for recurring donors).
- **Volunteer Acknowledgement** (on registration).
- **Volunteer Participation Thanks** (after event participation).

All emails are triggered via **Flows + Email Alerts**, ensuring reusability and easy maintenance.

### **Benefits of Process Automation**

- Saves manual effort by automating donor/volunteer communication.
- Reduces errors by enforcing validation rules.
- Improves donor & volunteer experience with timely acknowledgments.
- Standardizes communication using reusable email templates.