

Phase 4: Process Automation (Admin)

Flow Builder – Record-Triggered Flow: Auto-Assign Alumni to Events

- **Goal:** Automatically create an Event_Participant__c record when an Alumni registers for an Event.

Flow Setup:

- **Navigation:** Setup → Flows → New Flow → Record-Triggered Flow → Create
- **Object:** Event__c (or Registration__c, depending on your model)
- **Trigger:** A record is created or updated

Entry Conditions:

- Status__c equals “Registered”
- Alumni__c is not null

When to Run the Flow:


- After the record is saved (so related records can be created)

Flow Actions:








- **Action Type:** Create Records
- **Label:** Add Alumni to Event
- **How Many Records to Create:** One
- **Object:** Event_Participant__c
- **Set Field Values:**
 - Alumni__c = {!\$Record.Alumni__c}
 - Event__c = {!\$Record.Id}
 - Participation_Status__c = Confirmed

Save & Activate:

- **Flow Name:** Event_AutoAssign_Alumni
- **Activate the Flow**



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Custom Object Permissions

	Basic Access				Data Administration				Basic Access				Data Administration			
	Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields		Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields	
Alumni Events	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Alumni	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Camps	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		








Session Settings

Session Times Out After2 hours of inactivitySession Security Level Required at Login--None--

Password Policies



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SETUPCampaign Influence Settings

Campaign Influence

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Campaign Influence allows marketers to measure and report on multiple campaigns that have influenced a single opportunity. Influential campaigns can be associated to opportunities manually or automatically.

Campaign Influence	Enabled	Edit
Please wait while we recalculate! We're recalculating campaign influence. Wait until we're done before updating any settings on this page.		
		Edit