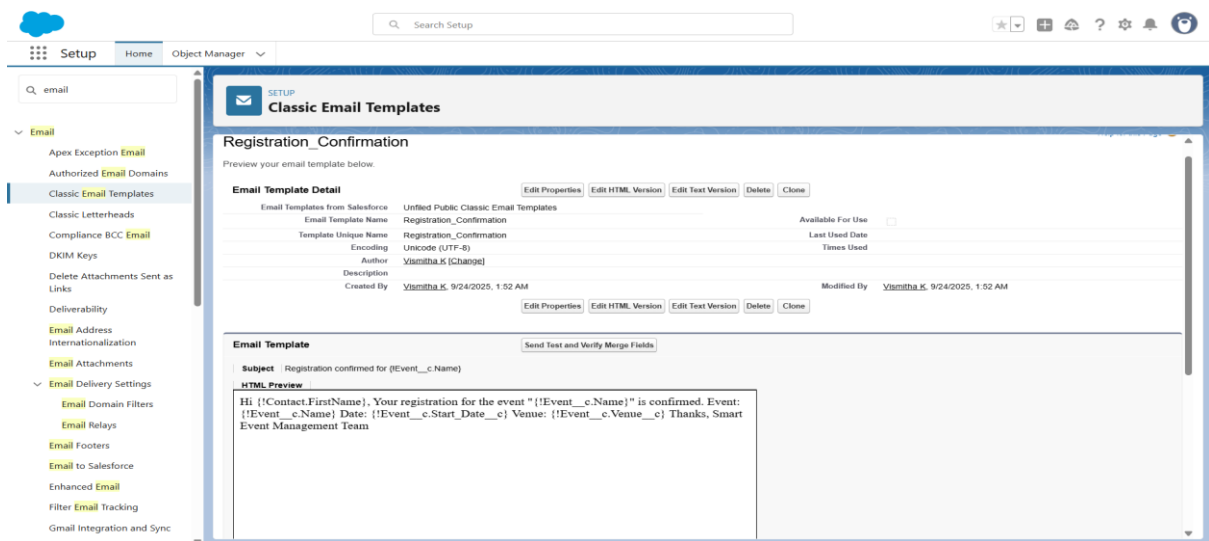


PHASE 4 – PROCESS AUTOMATION

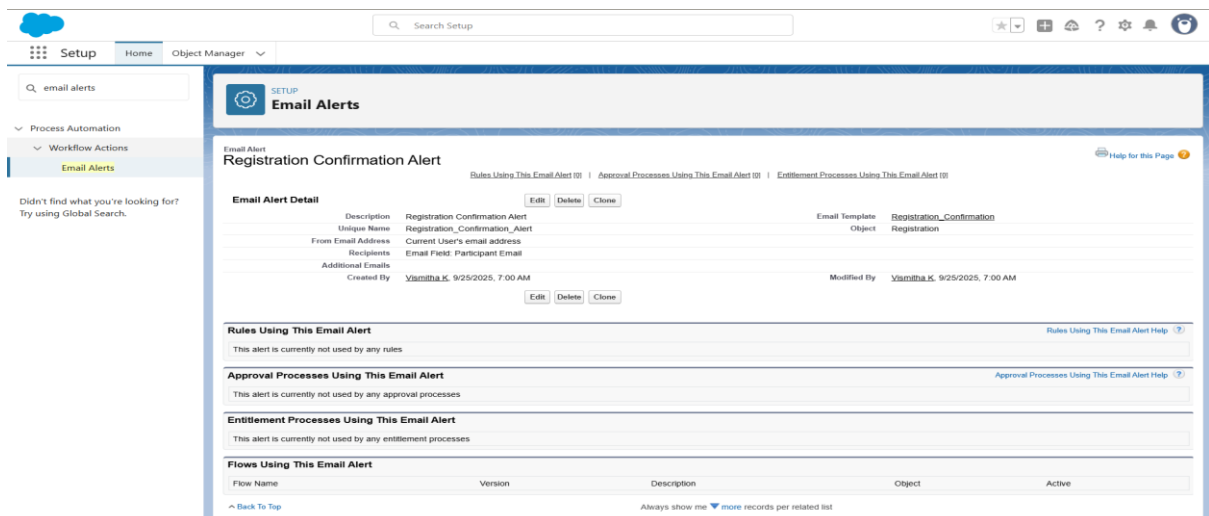
1. Email Templates & Email Alerts

Purpose: To automate communication with participants.

- **Email Template:** Registration_Confirmation
 - Subject: “Registration confirmed for {!Event__c.Name}”
 - Body: Provides event details (Name, Date, Venue) and confirmation message.



- **Email Alert:** Registration Confirmation Alert
 - Object: Registration__c
 - Recipient: Participant (Contact lookup)
 - Template: Registration_Confirmation

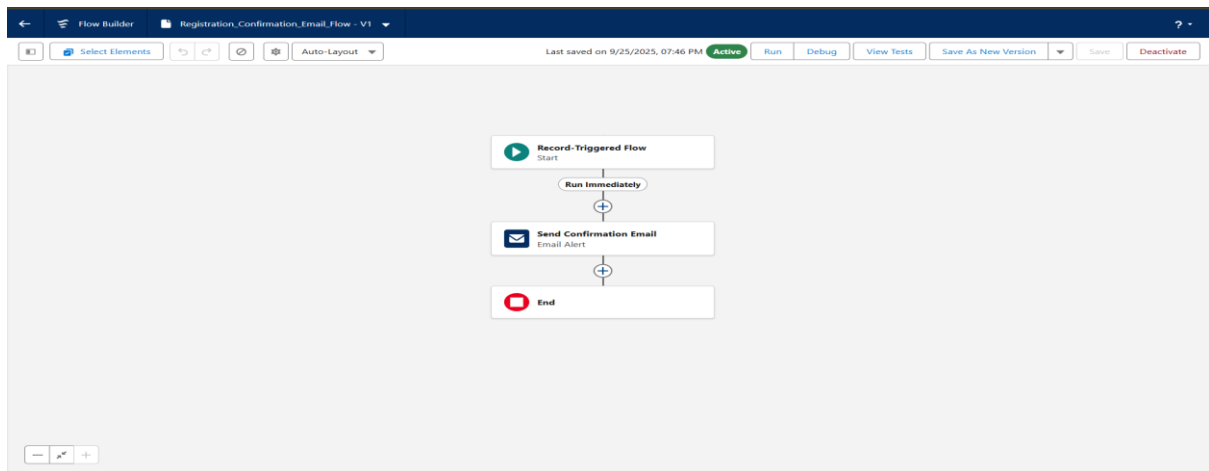


This setup allows Flows to send confirmation emails automatically upon successful registration.

2. Record-Triggered Flow – Registration Confirmation

Purpose: Send confirmation email after a registration is created.

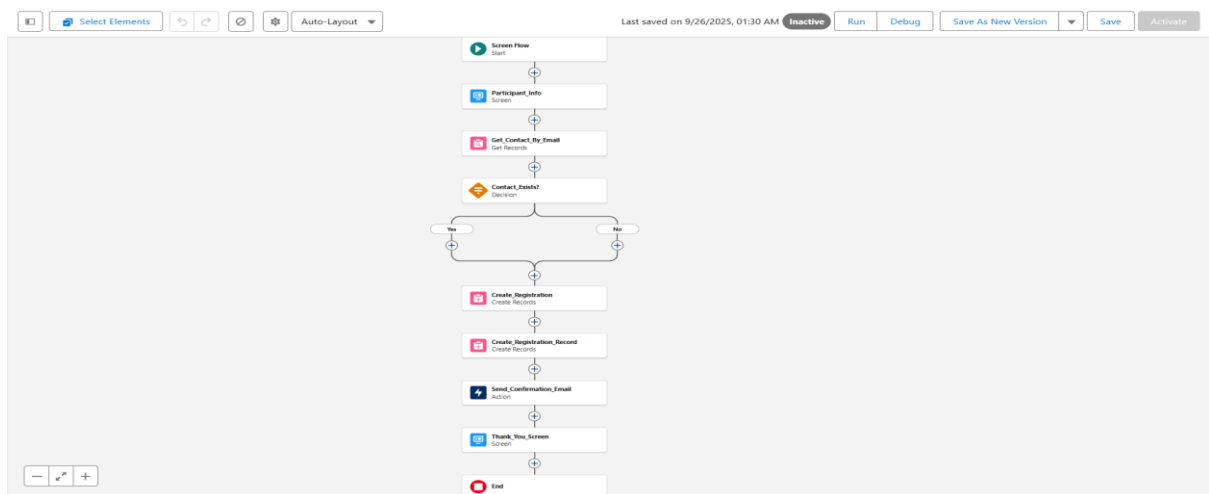
- **Flow Type:** Record-Triggered Flow
- **Object:** Registration__c
- **Trigger:** When a record is created
- **Elements:**
 - Action → Send Email Alert (Registration Confirmation Alert)
- **Outcome:** Participant receives an email instantly after registration creation.



3. Screen Flow – Participant Registration

Purpose: Provide a guided interface for self-service registration.

- **Flow Type:** Screen Flow

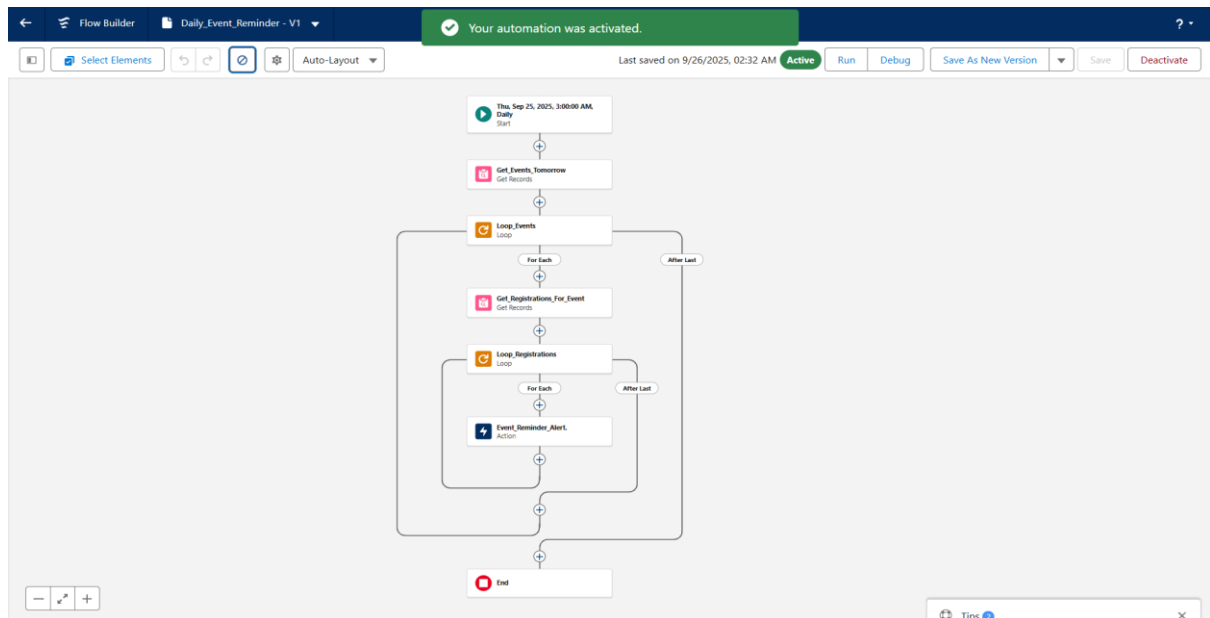


This allows participants to be registered directly via flow, improving user experience.

4. Scheduled Flow – Event Reminders

Purpose: Notify participants before the event date.

- **Flow Type:** Scheduled-Triggered Flow
- **Outcome:** Participants are reminded one day before the event.



5. Approval Process – High-Budget Events

Purpose: Ensure managerial oversight for expensive events.

- **Criteria:** Event Budget \geq ₹5,00,000 AND Status = Published
- **Outcome:** High-value events cannot proceed without approval.

The screenshot shows the "Approval Processes" setup page in a system. The page title is "Event: High_Budget_Event_Approval". The left sidebar contains navigation links: "Setup", "Home", "Object Manager", "Data", "Feature Settings", "Approval Settings", and "Process Automation". The main content area is divided into sections:

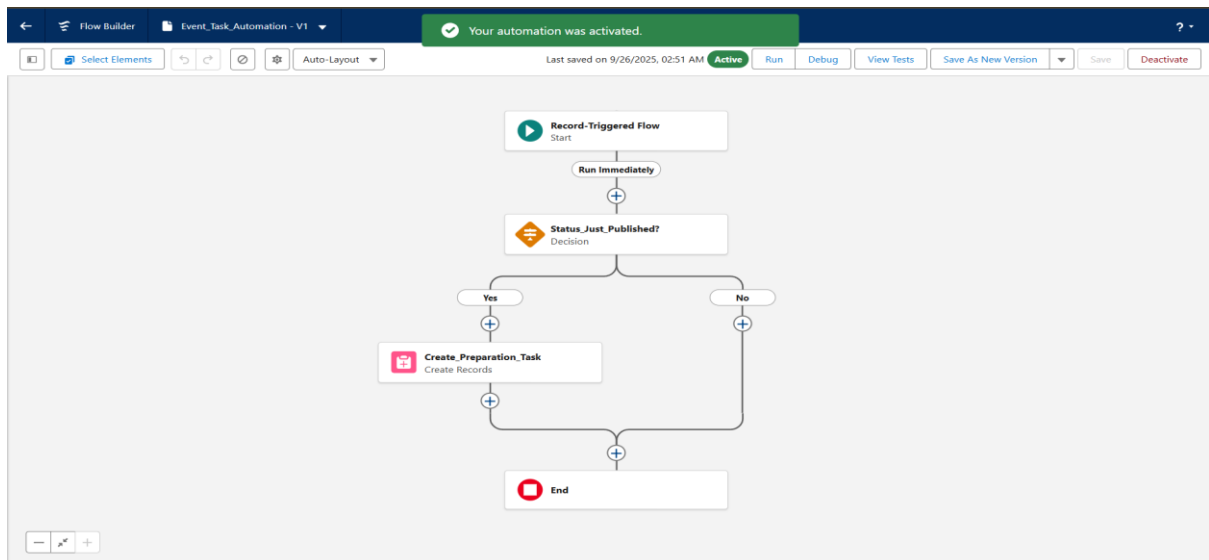
- Process Definition Detail:** Includes fields for Process Name, Unique Name, Description, Entry Criteria, Record Editability, Approval Assignment Email Template, Initial Submitters, and Created By. The process is marked as "Active".
- Initial Submission Actions:** Includes a table with columns for Action, Type, and Description. The action "Record Lock" is listed.
- Approval Steps:** Includes a table with columns for Action, Step Number, Name, Description, Criteria, Assigned Approver, and Reject Behavior. The step "High_Budget_Event_Approval" is listed.
- Final Approval Actions:** Includes a table with columns for Action, Type, and Description. The action "Record Lock" is listed.

The page includes a search bar at the top and a "Help for this Page" link in the top right corner.

6. Tasks Automation

Purpose: Assist organizers with timely preparation.

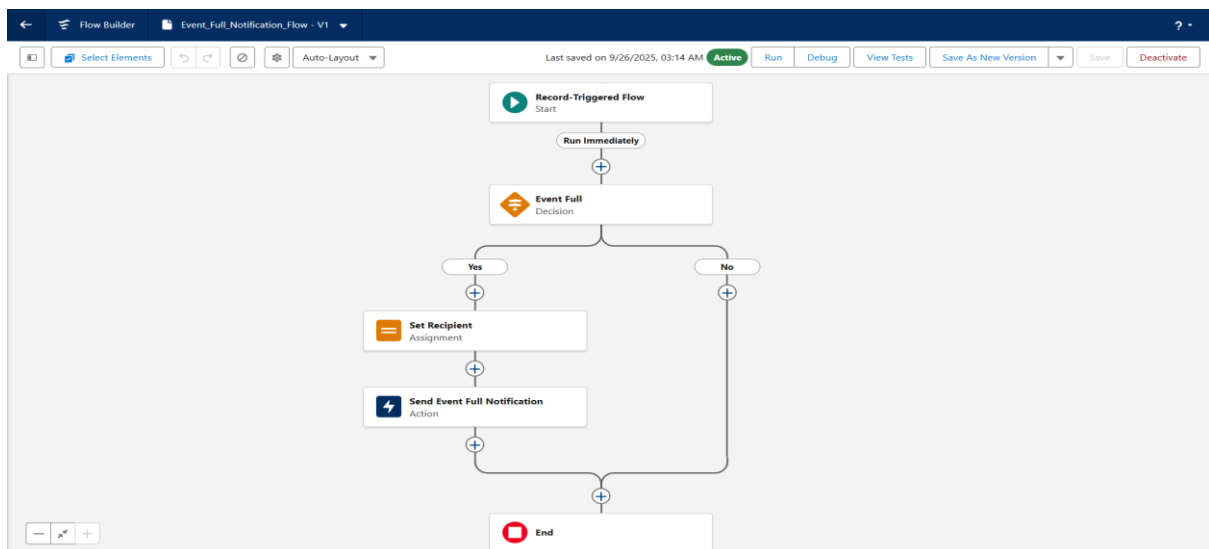
- **Flow:** Record-Triggered Flow on Event (after Status = Published)
- **Action:** Create Task for Event Organizer with subject “*Prepare for Event: {Event Name}*” scheduled one day before start.
- **Outcome:** Organizers receive actionable reminders for logistics.



7. Custom Notifications (In-App Alerts)

Purpose: Provide instant alerts within Salesforce.

- **Notification Type:** Event_Notice (Desktop + Mobile)
- **Use Case:** Triggered when Event capacity is full.
- **Recipient:** Event Organizer (User).



OUTCOME OF PHASE 4

- Automated **data validation**, ensuring clean records.
- Streamlined **participant communication** via emails and reminders.
- Enabled **self-service registration** through Screen Flow.
- Strengthened **governance** with approval process for costly events.
- Improved **task management** for organizers and real-time notifications.

The system is now robust, reduces manual intervention, and is ready for Phase 5 (Apex Programming).