Phase 4 Report: Process Automation (Admin)

1. Introduction

This phase focuses on automating attendee registration confirmation using Salesforce Flows and Email Alerts.

Automation ensures that when a new attendee registers for an event:

- A confirmation email is automatically sent
- Organizers can track registrations without manual effort

2. Automation Requirement

Scenario:

- When an **Attendee record** is created, send a **confirmation email** to the attendee.
- Ensure the **email contains event details** like Event Name, Date, and Location.

Automation Components:

- 1. **Record-Triggered Flow** on Attendee object
- 2. Lightning Email Template for confirmation
- 3. **Email Alert** connected to the Flow

3. Flow Creation

Steps:

- 1. Go to Setup \rightarrow Flows \rightarrow New Flow \rightarrow Record-Triggered Flow
- 2. Object: Attendee
- 3. Trigger: When a record is created
- 4. Condition Requirements: Optional (e.g., Event lookup is not blank)
- 5. Action: Send Email Alert
- 6. Activate the Flow

4. Email Template Creation

- Navigate to Setup → Email Templates → New Email Template → Lightning
- Name: Attendee Registration Confirmation

- Related Entity Type: Attendee
- Subject: Confirmation for {!Attendee.Event r.Name}
- Body: Include merge fields like:

```
Hello {!Attendee.Name},

You are successfully registered for the event: {!Attendee.Event_r.Name}
Date: {!Attendee.Event_r.Event_Date_c}
Location: {!Attendee.Event_r.Location_c}

Thank you for registering.

Insert Screenshot 5: Lightning Email Template screen
Insert Screenshot 6: Merge fields used in the email
```

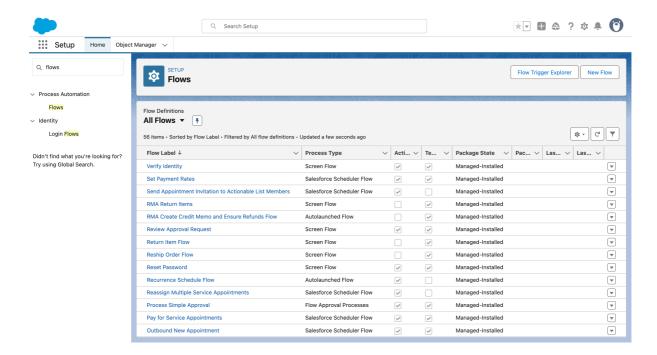
5. Email Alert Setup

Steps:

- 1. Go to Setup \rightarrow Email Alerts \rightarrow New Email Alert
- 2. Select the Attendee object
- 3. Choose Email Template created earlier
- 4. Set Recipient to Attendee's Email field
- 5. Save and link the Email Alert to the Flow

6. Testing the Automation

- 1. Create a **new Attendee record** via Event page or Attendee tab
- 2. Verify that the **confirmation email** is sent successfully
- 3. Check Activity History on Attendee record for email sent confirmation



7. Conclusion

The **Record-Triggered Flow and Email Alert** automation is now active.

- Automates attendee confirmation emails
- Reduces manual effort for event organizers
- Provides a foundation for further automation (like reminders, waitlists, etc.)

This completes **Phase 4**, and prepares the system for **Apex Programming / Advanced Automation** in Phase 5.