

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
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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
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3. Flow Creation

Steps:

1. Go to **Setup** → **Flows** → **New Flow** → **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
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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** → **Email Alerts** → **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
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Setup

Home

Object Manager

Process Automation

Flows

Identity

Login Flows

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SETUP

Flows

[Flow Trigger Explorer](#)
[New Flow](#)

Flow Definitions

All Flows

56 items • Sorted by Flow Label • Filtered by All flow definitions • Updated a few seconds ago

Flow Label	Process Type	Acti...	Te...	Package State	Pac...	Las...	Las...
Verify Identity	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Set Payment Rates	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Send Appointment Invitation to Actionable List Members	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Managed-Installed			
RMA Return Items	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
RMA Create Credit Memo and Ensure Refunds Flow	Autolaunched Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Review Approval Request	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Return Item Flow	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Reship Order Flow	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Reset Password	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Recurrence Schedule Flow	Autolaunched Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Managed-Installed			
Reassign Multiple Service Appointments	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Managed-Installed			
Process Simple Approval	Flow Approval Processes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Pay for Service Appointments	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Outbound New Appointment	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			

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.