

Phase 4: Process Automation (Admin)

Objective

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

Key Automations Implemented

1. Registration Confirmation Email

- **Tool:** Record-Triggered Flow
- **Trigger:** When a new Attendee record is created with **Record Type = Event Registration**
- **Action:** Sends a personalized **Registration Confirmation Email** to the attendee.
- **Logic:**
 - Confirms the event details (Name, Date, Time, Location).
 - Includes a message thanking the attendee for registering.
 - Blocks registration if the attendee has already registered for the same event (duplicate check).
 - Prevents registration if the event capacity is full.

2. Feedback Thank-You Email

- **Tool:** Record-Triggered Flow
- **Trigger:** When an Attendee record is updated with **Record Type = Event Feedback**
- **Action:** Sends a **Feedback Thank-You Email** acknowledging the attendee's input.
- **Logic:**
 - Ensures feedback is only submitted after the event date.
 - Includes feedback summary (Rating & Comments) in the email.

3. Event Capacity & Duplicate Registration Check

- **Tool:** Record-Triggered Flow
- **Trigger:** During registration of an attendee

- **Actions:**
 - Checks if the attendee has already registered for the same event.
 - Verifies if event capacity has been reached.
 - Blocks the record creation and shows a friendly error message if conditions are not met.

Validation Rules for Data Accuracy

1. **Event Required Rule:** Event field cannot be blank.
2. **Duplicate Registration Rule:** Prevents same attendee (email or name) from registering for the same event more than once.
3. **Feedback Date Rule:** Feedback cannot be submitted before the event date.
4. **Phone Number Rule:** Must be exactly 10 digits.
5. **Email Format Rule:** Must contain "@" symbol.

Email Templates & Alerts

Template Name	Purpose
Registration_Confirmation	Sent after successful event registration
Feedback_Confirmation	Sent after feedback submission
Event_Full_Notification	Sent when attendee cannot register due to capacity limit

All emails are triggered via **Flows + Email Alerts**, ensuring reusability, maintainability, and consistent communication.