

Phase 4: Process Automation & Business Logic

1. Approval Process Implementation

Large Donation Approval Process

I made this flow to ensure proper oversight for high-value contributions above ₹50,000, demonstrating internal controls and compliance awareness.

Implementation:

- Created a record-triggered flow on the Donation object
- Set entry criteria: Amount__c > 50000
- Used the "Submit for Approval" action element
- Configured a single approval stage with NGO Leadership as the approver
- Added field updates to change Payment Status to "Approved" or "Rejected" based on outcome

Technical Details:

- Flow Type: Record-Triggered (after save)
- Approver: NGO Leadership role
- Condition: Amount greater than 50,000 INR
- Status Field Update: Payment_Status__c

This flow now automatically routes for leadership approval, ensuring compliance and proper oversight without manual intervention.

2. Email Automation

Donation Thank-You Email

To automatically engage donors immediately after their contribution, improving donor retention and satisfaction.

Implementation:

- Created a record-triggered flow on Donation object
- Set condition: Payment_Status__c = "Received"
- Used "Send Email" action with dynamic recipient addressing
- Crafted a personalized email template with merge fields

Email Template Content:

Dear {!\$Donation__c.Contact__c.FirstName},

Thank you for your generous donation of ₹{!\$Donation__c.Amount__c} to support our "{!\$Donation__c.Program__c.Program_Name__c}" program.

Your contribution will make a real difference in the lives of those we serve.

With gratitude,

The CauseConnect Team

Business Impact: Donors now receive immediate, personalized acknowledgment, strengthening relationships and encouraging repeat donations.

3. Learning & Adaptation

Challenges Overcome

1. Flow Builder Complexity: Initially struggled with the new Flow-Based Approval Process interface but mastered the "Submit for Approval" element
2. Field Reference Issues: Learned to properly reference Contact__c instead of incorrect field names
3. Performance Optimization: Addressed Salesforce warnings about efficient filtering in Get Records elements

Strategic Decisions

- Prioritized Approval Process over complex total calculation flows due to higher business impact
- Chose Simple Email Automation that delivers immediate value without over-engineering
- Focused on Core Governance rather than "nice-to-have" features that add complexity

4. Business Value Delivered

Governance & Compliance

- Approval workflow for donations above ₹50,000

- Audit trail through Salesforce's built-in approval history
- Status tracking with clear approved/rejected states

Donor Engagement

- Automated thank-you emails upon donation receipt
- Personalized communication using merge fields
- Immediate acknowledgment improving donor experience

Operational Efficiency

- Reduced manual work for fundraising team
- Standardized processes ensuring consistency
- Real-time notifications and status updates

5. Future Automation Opportunities Documented

While I implemented the most critical automations, I documented these for future expansion:

Scheduled Flows

- Monthly donation summary emails to leadership
- Quarterly impact reports to major donors

Advanced Notifications

- Program manager alerts when new beneficiaries are added
- Field officer task assignments based on beneficiary locations

Integration Automation

- Payment gateway webhook processing
- External system sync for audit data

Conclusion

This phase transformed CauseConnect from a **data storage system** to an **intelligent operations platform**. The approval process demonstrates understanding of nonprofit governance needs, while the email automation shows donor-centric thinking. By focusing on high-impact, reliable automations rather than complex but fragile features, I delivered tangible business value that NGOs can immediately benefit from.