# Phase 4: Process Automation (Admin) — Event Management System

## Objective

Automate the core event management lifecycle — from event creation and attendee registration to approvals, notifications, and post-event follow-ups — to ensure smooth operations and data accuracy.

## 1. Validation Rules

Maintain data accuracy and prevent incomplete or invalid records.

Examples:

* - Event Start Date cannot be after End Date.
* - Require Venue for Published Events.
* - Attendee Email Required for Registration.

## 2. Workflow Rules (Legacy)

Automate simple, single-condition actions such as notifications or updates.

Examples:

* - Send an email when a new event is created (Status = Draft).
* - Auto-update event status to 'Closed' when End Date is past today.

## 3. Process Builder

Automate related actions in multi-step processes (can be migrated to Flows).

Examples:

* - When a new Attendee is added, create a confirmation Task and send notification.
* - When Event status = Published, notify team and update 'Published Date' field.

## 4. Approval Process

Ensure quality control and management approval for key actions.

Examples:

* - Budget Approval if Budget > $5,000.
* - Event Publish Approval before changing to 'Published' status.

## 5. Flow Builder (Primary Automation Tool)

a. Screen Flow: Guided form for creating new events or registering attendees.

b. Record-Triggered Flow: Automate updates and notifications when records change.

c. Scheduled Flow: Daily reminders and automatic status updates.

d. Auto-Launched Flow: Background calculations (e.g., Event Revenue).

## 6. Email Alerts

Send automated messages for reminders, confirmations, and approvals.

Examples:

* - Event Confirmation Email after registration.
* - Event Reminder 2 days before start date.
* - Post-Event Feedback Email after completion.

## 7. Field Updates

Automatically update fields based on record changes.

Examples:

* - When Event Date < Today → Set Status = Completed.
* - Update Attendee Count after each registration.

## 8. Tasks

Assign follow-up responsibilities automatically.

Examples:

* - Create 'Confirm Venue Booking' task for Admin on event creation.
* - Create 'Upload Photos' task for Marketing after event.

## 9. Custom Notifications

Send real-time in-app or mobile alerts to users.

Examples:

* - Notify Event Coordinator when high-profile attendee registers.
* - Notify Manager when budget approval is pending.