

Phase 4: Process Automation (Admin)

Project: Student Accommodation Finder

Automation in Salesforce helps the admin handle repetitive tasks such as notifications, approvals, reminders, status updates, and record management. This phase covers all major Salesforce automation tools:

1. Validation Rules

Purpose: Maintain data quality and prevent invalid entries.

- **Student Email Validation:**
 - Object: Student
 - Rule: ISBLANK(Email)
 - Error Message: “Email field cannot be blank.”
- **Accommodation Rent Validation:**
 - Object: Accommodation
 - Rule: Rent__c <= 0
 - Error Message: “Rent must be greater than 0.”
- **Booking Date Validation:**
 - Object: Booking
 - Rule: BookingDate__c < TODAY()
 - Error Message: “Booking date cannot be in the past.”

Student Validation Rule

[Back to Student](#)

Validation Rule Detail

EditClone

Rule Name	Valid_Email	Active	✓
Error Condition Formula	NOT(CONTAINS(Student_email__c , "@"))		
Error Message	Please enter a valid email address	Error Location	Student_email
Description	email validation rule		
Created By	Aakarsh verma, 9/24/2025, 4:14 AM	Modified By	Aakarsh verma, 9/24/2025, 4:14 AM

EditClone

Accommodation Validation Rule

[Back to Accommodation](#)

Validation Rule Detail

[Edit](#) [Clone](#)

Rule Name	Rent_Positive	Active	✓
Error Condition Formula	Rent__c <= 0		
Error Message	Rent must be greater than 0	Error Location	Rent
Description			
Created By	Aakarsh verma , 9/21/2025, 10:20 PM		Modified By Aakarsh verma , 9/24/2025, 4:12 AM

[Edit](#) [Clone](#)

Booking Validation Rule

[Back to Booking](#)

Validation Rule Detail

[Edit](#) [Clone](#)

Rule Name	Booking_Payment_Required	Active	✓
Error Condition Formula	AND(ISPICKVAL(Status__c, "Confirmed"), Total_Payments_c__c = 0)		
Error Message	Payment must exits before confirming booking	Error Location	Status
Description			
Created By	Aakarsh verma , 9/24/2025, 4:11 AM		Modified By Aakarsh verma , 9/24/2025, 4:11 AM

[Edit](#) [Clone](#)

Workflow Rules

Purpose: Automatically perform actions based on record changes.


A. Booking Object

- Trigger: When a new booking is created
- Criteria: TRUE
- Immediate Actions:
 - Email Alert → Send booking details to the landlord
 - Task → Create task for landlord: “Follow up on new booking”

Workflow Rule

Notify_Landlord_New_Booking

[« Back to List: Email Alerts](#)

 Go with the flow! With Flow Builder, the future of low-code automation, you can do everything you do with workflow rules — and more! Salesforce plans to retire workflow rules and recommends building automation in Flow Builder. [More](#) | [Migrate your workflow rules to flows](#)

Workflow Rule Detail

[Edit](#) [Clone](#) [Deactivate](#)

Rule Name	Notify_Landlord_New_Booking	Object	Booking
Active	✓	Evaluation Criteria	Evaluate the rule when a record is created
Description			
Rule Criteria	Booking: Status EQUALS Pending		
Created By	Aakarsh verma , 9/24/2025, 4:44 AM		Modified By Aakarsh verma , 9/24/2025, 7:57 AM

B. Payment Object

- Trigger: When payment is completed
- Criteria: Payment_Status__c = 'Completed'
- Immediate Actions:
 - Email Alert → Send receipt to student
 - Field Update → Update Booking.Status__c = Paid

Workflow Rule
Notify_Student_On_Payment_Confirmed
« Back to List: Email Alerts

Go with the flow! With Flow Builder, the future of low-code automation, you can do everything you do with workflow rules — and more! Salesforce plans to retire workflow rules and recommends building automation in Flow Builder. [Tell Me More](#) | [Migrate your workflow rules to flows](#)

Workflow Rule Detail [Edit](#) [Clone](#) [Deactivate](#)

Rule Name	Notify_Student_On_Payment_Confirmed	Object	Payment
Active	✓	Evaluation Criteria	Evaluate the rule when a record is created
Description			
Rule Criteria	ISPICKVAL(Payment_Status__c, "Completed")		
Created By	Aakarsh verma, 9/24/2025, 7:54 AM	Modified By	Aakarsh verma, 9/24/2025, 7:56 AM

C. Accommodation Object

- Trigger: When a related booking is confirmed
- Criteria: Booked__c = TRUE
- Immediate Actions:
 - Field Update → Update Accommodation.Status__c = Unavailable

Workflow Rule
Mark_Accommodation_Unavailable
« Back to List: Email Alerts [Help for this Page](#)

Go with the flow! With Flow Builder, the future of low-code automation, you can do everything you do with workflow rules — and more! Salesforce plans to retire workflow rules and recommends building automation in Flow Builder. [Tell Me More](#) | [Migrate your workflow rules to flows](#)

Workflow Rule Detail [Edit](#) [Clone](#) [Deactivate](#)

Rule Name	Mark_Accommodation_Unavailable	Object	Accommodation
Active	✓	Evaluation Criteria	Evaluate the rule when a record is created, and every time it's edited
Description	Marks accommodation as unavailable when Booked__c is checked		
Rule Criteria	Booked__c = TRUE		
Created By	Aakarsh verma, 9/24/2025, 7:39 AM	Modified By	Aakarsh verma, 9/24/2025, 7:41 AM

Process Builder

Purpose: Execute complex logic and multiple actions in one process.

A. Student Object

- Action: New student created → Automatically send welcome email
- Steps:
 1. Object = Student → Start process on record creation
 2. Criteria = None (always true)
 3. Immediate Action → Email Alert → Template: "Welcome Student"

B. Landlord Object

- Action: Landlord registers and status = Pending Verification → Assign task to Admin
- Steps:
 1. Object = Landlord → Start on creation or edit
 2. Criteria: ISPICKVAL(Status__c, "Pending Verification")
 3. Immediate Action → Create Task → Assigned To: Admin, Subject: "Verify Landlord Profile"

My Processes 4 items							New
PROCESS ▾	DESCRIPTION	OBJECT	PROCESS TYPE	LAST MODIFIED	STATUS	ACTIONS	
> Welcome_New_Student	Send welcome email to newly registered s...	Student	Record Change	9/24/2025	Active		
> Verify_New_Landlord	Assign task to admin when new landlord r...	Landlord	Record Change	9/24/2025	Active		
> Update_Accommodation_Status	Update Accommodation status when boo...	Booking	Record Change	9/24/2025	Active		
> Payment_Completed_Process	Update Booking status and send email wh...	Payment	Record Change	9/24/2025	Active		

Approval Process

Purpose: Admin approval before an accommodation is listed.

Steps:

1. Name: Accommodation_Approval_Process
2. Entry Criteria: Status__c = Pending Approval
3. Approver: Admin
4. Initial Submission Action: Notify Admin via Email
5. **Final Approval Actions:**
 - Field Update → Status__c = Available
 - Email Alert → Notify Landlord
 - Optional Task → Follow up with student
 - Optional Custom Notification → Notify Student
6. **Final Rejection Actions:**
 - Field Update → Status__c = Rejected
 - Email Alert → Notify Landlord
 - Optional Task → Landlord follow-up
 - Optional Custom Notification → Notify Landlord



SETUP

Approval Processes

Approval Processes

Accommodation: Accommodation_Approval_Process

[« Back to Approval Process List](#)

Process Definition Detail

[Edit](#) [Clone](#) [Deactivate](#)

Process Name	Accommodation_Approval_Process	Active	<input checked="" type="checkbox"/>
Unique Name	Accommodation_Approval_Process	Next Automated Approver Determined By	
Description			
Entry Criteria	Accommodation: Status EQUALS Pending Approval		
Record Editability	Administrator ONLY	Allow Submitters to Recall Approval Requests	<input type="checkbox"/>
Approval Assignment Email Template	Accommodation Pending Approval		
Initial Submitters	Accommodation Owner, Role: Admin		
Created By	Aakarsh verma, 9/24/2025, 11:32 PM	Modified By	Aakarsh verma, 9/25/2025, 1:55 AM

Flow Builder

A. Record-Triggered Flow

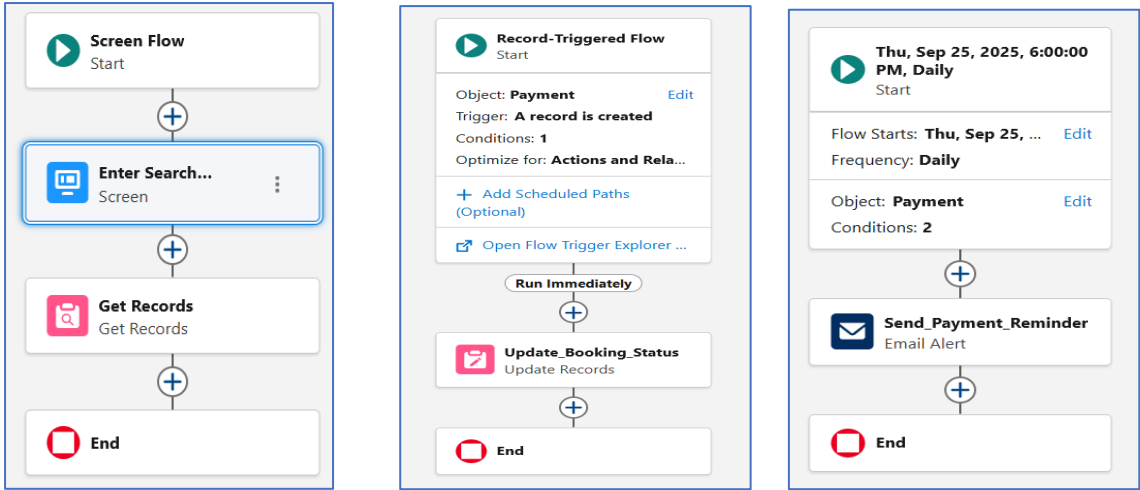
- Use Case: Payment completed → Update Booking status
- Steps:
 - Object = Payment → Trigger on update
 - Criteria: Payment.Status__c = Completed
 - Action: Update Booking.Status__c = Paid

B. Scheduled Flow

- Use Case: Reminder for pending payments after 2 days
- Steps:
 - Object = Payment
 - Schedule: Daily at 6 PM
 - Criteria: Payment.Status__c = Pending AND Payment.CreatedDate <= TODAY()-2
 - Action: Send Email Alert → Student

C. Screen Flow

- Use Case: Student searches accommodations and books
- Steps:
 1. Screen → Input filters: City, Budget, Type
 2. Get Records → Filter available accommodations
 3. Screen → Show Data Table with selection
 4. Create Booking Record → Status = Pending
 5. Confirmation Screen → Display success message



Email Alerts

- Templates for:
 - Student Register → Welcome Student
 - Payment reminder → Notify Student
 - Accommodation approved → Notify Landlord
 - Accommodation rejected → Notify Landlord

SETUP

Classic Email Templates

Text Email Template

Send Payment Reminder

[« Back to List: Email Alerts](#)

Preview your email template below.

Email Template Detail

EditDeleteClone

Email Templates from Salesforce	Unfiled Public Classic Email Templates	Available For Use	✓
Email Template Name	Send_Payment_Reminder	Last Used Date	
Template Unique Name	Send_Payment_Reminder	Times Used	
Encoding	Unicode (UTF-8)		
Author	Aakarsh verma [Change]		
Description			
Created By	Aakarsh verma 9/25/2025, 12:53 AM	Modified By	Aakarsh verma 9/25/2025, 12:53 AM

EditDeleteClone

SETUP

Classic Email Templates

Text Email Template

Accommodation Approved

[« Back to List: Email Alerts](#)


Preview your email template below.

Email Template Detail

EditDeleteClone

Email Templates from Salesforce	Unfiled Public Classic Email Templates	Available For Use	✓
Email Template Name	Accommodation Approved	Last Used Date	
Template Unique Name	Accommodation_Approved	Times Used	
Encoding	Unicode (UTF-8)		
Author	Aakarsh verma [Change]		
Description			
Created By	Aakarsh verma 9/24/2025, 11:57 PM	Modified By	Aakarsh verma 9/24/2025, 11:57 PM

EditDeleteClone


SETUP

Classic Email Templates

Text Email Template

Accommodation Rejected

« [Back to List: Email Alerts](#)


Preview your email template below.

Email Template Detail

Edit Delete Clone

Email Templates from Salesforce	Unfiled Public Classic Email Templates	Available For Use	✓
Email Template Name	Accommodation Rejected	Last Used Date	
Template Unique Name	Accommodation_Rejected	Times Used	
Encoding	Unicode (UTF-8)		
Author	Aakarsh verma [Change]		
Description			
Created By	Aakarsh verma , 9/24/2025, 11:59 PM	Modified By	Aakarsh verma , 9/24/2025, 11:59 PM

Edit Delete Clone


SETUP

Classic Email Templates

Custom Email Template

New Student Registration

« [Back to List: Email Alerts](#)

Preview your email template below.

Email Template Detail

Edit Properties Edit HTML Version Edit Text Version Delete Clone

Email Templates from Salesforce	Unfiled Public Classic Email Templates	Available For Use	✓
Email Template Name	New_Student_Registration	Last Used Date	
Template Unique Name	New_Student_Registration	Times Used	
Encoding	Unicode (UTF-8)		
Author	Aakarsh verma [Change]		
Description	Notifies admin when a new student registers		
Created By	Aakarsh verma , 9/24/2025, 6:55 AM	Modified By	Aakarsh verma , 9/24/2025, 6:55 AM

Edit Properties Edit HTML Version Edit Text Version Delete Clone

Field Updates

- Booking__c.Status__c → Paid (on Payment completion)
- Accommodation__c.Status__c → Available/Rejected (on Approval/Reject)
- Accommodation__c.Status__c → Unavailable (on Booking confirmed)

Tasks

- Landlord follow-up on new booking
- Admin verify new landlord registration
- Optional task for rejected accommodation → Landlord action

Custom Notifications

- Booking approved → Student receives in-app notification
- Accommodation rejected → Landlord receives in-app notification