

Project Title: Event Venue CRM

Phase 4 — Process Automation (Admin)

4.1 Validation Rules

Purpose: Enforce data integrity before records are saved.

Examples:

- Booking End Date/Time must be after Start Date/Time
 - Object: Booking
 - Rule: `End_DateTime__c > Start_DateTime__c`
 - Error Message: “End Date/Time must be after Start Date/Time.”
- Number of Guests cannot exceed Venue Capacity
 - Object: Booking
 - Rule: `Number_of_Guests__c <= Venue__r.Capacity__c`
 - Error Message: “Number of Guests exceeds Venue Capacity.”

Setup:

- Setup → Object Manager → Booking → Validation Rules → New → Enter formula, error message, save & activate.

The screenshot shows the Salesforce Setup interface. The breadcrumb trail is: Setup > Object Manager > Booking > Validation Rules. The page title is "Booking" with a "New" button. A sidebar on the left lists various setup options, with "Validation Rules" selected. The main content area displays a table of validation rules for the Booking object, sorted by Rule Name. There are three rules listed:

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
AmountNonNegative	Booking Amount	Booking amount cannot be negative	✓	Abhishek Hunashyal, 9/22/2025, 3:37 AM
GuestsLessThanCapacity	Top of Page	Number of guests exceeds venue capacity	✓	Abhishek Hunashyal, 9/22/2025, 3:39 AM
StartBeforeEnd	Start Date/Time	Start Date/Time must be before End Date/Time	✓	Abhishek Hunashyal, 9/22/2025, 3:35 AM

4.2 Workflow Rules (*Legacy, optional*)

Purpose: Automate simple tasks like email alerts, field updates, or tasks.

Example:

- Send email to Venue Manager when a Booking is **Confirmed**
 - Object: Booking
 - Rule Criteria: Status__c = "Confirmed"
 - Immediate Actions: Email Alert (pre-created template), Field Update, Task creation

Setup:

- Setup → Workflow Rules → New Rule → Select Object → Define Criteria → Add Actions → Activate

The screenshot shows the Salesforce Setup interface. The left sidebar contains a navigation menu with categories like Process Automation, User Interface, Translation Workbench, and Security. The 'Workflow Rules' link is highlighted under Process Automation. The main content area is titled 'All Workflow Rules' and includes a 'New Rule' button. Below this, there is a table listing existing workflow rules. The table has columns for Action, Rule Name, Description, Object, and Active status. Three rules are listed, all for the 'Booking' object and marked as 'Active'.

Action	Rule Name	Description	Object	Active
Edit Del Deactivate	AutoConfirm_ZeroAmount		Booking	✓
Edit Del Deactivate	BookingConfirmed_Email		Booking	✓
Edit Del Deactivate	BookingConfirmed_Email		Booking	✓

4.3 Process Builder

Purpose: Advanced automation combining multiple actions on record create/update.

Example 1: Booking Conflict Notification

1. Object: Booking
2. Trigger: When a record is created or edited
3. Criteria: Conflict__c = TRUE
4. Immediate Actions:
 - **Create Task** → Assign to Venue Manager
 - **Send Email** → Notify Customer

Example 2: Update Payment Status

- When a new Booking Payment is **Completed**, update Booking.Payment_Status__c to reflect total paid

Setup:

- Setup → Process Builder → New → Select Object → Define Criteria → Add Immediate Actions → Save & Activate

The screenshot shows the Salesforce Setup interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager'. Below this is a banner for 'My Processes' with a 'New' button. The main content area displays a table of processes. The table has columns for Process, Description, Object, Process Type, Last Modified, Status, and Actions. One process is listed: 'BookingAutoConfirmZeroAmount' with a description 'Auto-confirm bookings when amount is zero', object 'Booking', process type 'Record Change', last modified '9/22/2025', and status 'Active'.

PROCESS ▲	DESCRIPTION	OBJECT	PROCESS TYPE	LAST MODIFIED	STATUS	ACTIONS
> BookingAutoConfirmZeroAmount	Auto-confirm bookings when amount is zero	Booking	Record Change	9/22/2025	Active	

4.4 Approval Process

Purpose: Require manager approval for certain bookings (e.g., VIP, corporate events).

Steps:

1. Setup → Approval Processes → New Approval Process → Select Object: Booking
2. Define Entry Criteria: e.g., Booking_Type__c = "Corporate" AND Status__c = "Requested"
3. Approver: Assign to Venue Manager or Manager role
4. Approval Steps:
 - Approve → Status__c = Approved
 - Reject → Status__c = Rejected
5. Optional Actions: Email Alerts, Field Updates

The screenshot shows the Salesforce Setup interface for the 'Approval Processes' section. The left sidebar contains navigation links: Setup, Home, Object Manager, and a search bar. The main content area is titled 'Approval Processes' and 'Booking'. It includes a 'Manage Approval Processes For: Booking' dropdown menu. Below this, there is a 'Create New Approval Process' button. The 'Active Approval Processes' section displays a table with one process: 'High Value Booking Approval'. The table has columns for Action, Process Order, Approval Process Name, and Description. The 'Inactive Approval Processes' section shows 'No approval processes available'.

Setup

Home Object Manager

Search Setup

Approval Processes

Booking

Approvals are complex business processes that require information gathering and planning before implementing. It is recommended that you follow the instructions below before getting started.

1. Read the help topic
2. View the checklist
3. Create a custom user hierarchical relationship field
4. Create email templates
5. Create an approval process using either the Jump Start or Standard Wizard
6. Add Approval History Related List to all page layouts
7. Activate the process to deploy to your users

Manage Approval Processes For: Booking

Create New Approval Process

Active Approval Processes

Action	Process Order	Approval Process Name	Description
Edit Deactivate	1	High Value Booking Approval	

Inactive Approval Processes

No approval processes available

4.5 Flow Builder

Types:

- Screen Flow → User-guided input
- Record-Triggered Flow → Automate on record create/update
- Scheduled Flow → Runs at specific time
- Autolaunched Flow → Triggered via Process Builder, buttons, or Apex

Example: Booking Conflict Automation

1. Trigger: Record-Triggered on Booking create/update
2. Get Records → Get Venue Manager
3. Decision → ConflictExists (check overlapping bookings)
4. Actions → Create Task + Send Custom Notification

Setup:

- Setup → Flows → New Flow → Choose type → Drag elements → Connect → Save & Activate

The screenshot shows the Salesforce Setup interface. On the left, there's a navigation menu with 'Setup' selected. The main content area is titled 'SETUP Flows' and shows a list of flow definitions. The list is filtered by 'All Flows' and sorted by 'Process Type'. The table below shows the details of various flows, including their labels, process types, active status, and last modified dates.

Flow Label	Process Type	Active	Template	Package State	Package Na...	Last Modified By	Last Modified Date
Add or Modify Service Appointment Attendees	Salesforce Scheduler Flow	✓	□	Managed-Installed			
Set Payment Rates	Salesforce Scheduler Flow	✓	✓	Managed-Installed			
Create Waitlist	Salesforce Scheduler Flow	✓	✓	Managed-Installed			
Enroll or Unenroll Service Appointment Attendees	Salesforce Scheduler Flow	✓	✓	Managed-Installed			
Outbound New Appointment	Salesforce Scheduler Flow	✓	✓	Managed-Installed			
Inbound New Guest Appointment	Salesforce Scheduler Flow	✓	✓	Managed-Installed			
Inbound Cancel Appointment	Salesforce Scheduler Flow	✓	✓	Managed-Installed			
Inbound Modify Appointment	Salesforce Scheduler Flow	✓	✓	Managed-Installed			
Inbound New Appointment	Salesforce Scheduler Flow	✓	✓	Managed-Installed			
Book Appointment from Invitation	Salesforce Scheduler Flow	✓	✓	Managed-Installed			
Generate Appointment Invitation	Salesforce Scheduler Flow	✓	✓	Managed-Installed			
Modify Guest Service Appointment	Salesforce Scheduler Flow	✓	✓	Managed-Installed			
Outbound Modify Appointment	Salesforce Scheduler Flow	✓	✓	Managed-Installed			
Pay for Service Appointments	Salesforce Scheduler Flow	✓	✓	Managed-Installed			
Reassign Multiple Service Appointments	Salesforce Scheduler Flow	✓	□	Managed-Installed			
Send Appointment Invitation to Actionable List Members	Salesforce Scheduler Flow	✓	□	Managed-Installed			
Process Simple Approval	Flow Approval Processes	✓	✓	Managed-Installed			
Daily Reminder	Autolaunched Flow	✓	□	Unmanaged		Abhishek Hunashyal	9/22/2025, 7:19 AM
Update Booking	Autolaunched Flow	✓	□	Unmanaged		Abhishek Hunashyal	9/22/2025, 7:32 AM

4.6 Email Alerts

Purpose: Notify users via email when certain events happen.

Example:

- Booking Confirmed → Email to Customer & Venue Manager
- Payment Completed → Email receipt to Customer

Setup:

- Setup → Email Alerts → New → Select Object & Template → Recipients → Save

The screenshot shows the Salesforce Setup interface. On the left is a navigation menu with categories like Email Domain Filters, Email Relays, Email Footers, Email to Salesforce, Enhanced Email, Filter Email Tracking, Gmail Integration and Sync, Lightning Email Templates, Mail Merge Templates, Organization-Wide Addresses, Outlook Integration and Sync, Send through External Email Services, Test Deliverability, Feature Settings, Chatter, Email Settings, Service, Email-to-Case, Process Automation, and Workflow Actions. The 'Email Alerts' option under Workflow Actions is selected. The main content area is titled 'SETUP Email Alerts' and 'All Email Alerts'. It includes a search bar, a 'View: All Email Alerts' dropdown, and a 'Create New View' link. Below this is a table with columns: Action, Description, Email Template Name, Object, and Last Modified Date. The table lists 12 email alerts, all with the 'Booking' object and a last modified date of 9/22/2025. The table is paginated with 12 items per page. At the bottom of the table, there is a navigation bar with letters A through Z and an 'All' link.

Action	Description	Email Template Name	Object	Last Modified Date
Edit Del	Booking Confirmation Alert	Booking Confirmation Classic	Booking	9/22/2025
Edit Del	Booking Confirmation Alert	Booking Approved	Booking	9/22/2025
Edit Del	Booking Confirmation Alert1	Booking Confirmation Classic	Booking	9/22/2025
Edit Del	Booking Confirmation Alert6	Booking Confirmation	Booking	9/23/2025
Edit Del	Booking Approved Alert	Booking Approved	Booking	9/22/2025
Edit Del	Booking Approved Alert3	Booking Approved	Booking	9/22/2025
Edit Del	Booking Approved Alert4	Booking Approved	Booking	9/22/2025
Edit Del	Booking Rejected Alert	Booking Rejected	Booking	9/22/2025
Edit Del	Booking Rejected Alert1	Booking Rejected	Booking	9/22/2025
Edit Del	Booking Submitted Alert	Booking Submitted	Booking	9/22/2025

4.7 Field Updates

Purpose: Automatically update field values based on conditions.

Example:

- Update Booking.Payment_Status__c to “Paid” when total payments \geq Booking Amount
- Object: Booking \rightarrow Workflow/Process \rightarrow Field Update \rightarrow Save & Activate

[Setup > Object Manager](#)

Booking

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Object Access

Triggers

Flow Triggers

Flow Trigger Explorer

New Flow

Flow Triggers

3 items • Sorted by Flow Label

Flow Label	Process Type	Trigger	Active	Last Modified By	Last Modified Date
Booking_AutoConfirm_BeforeSave	Autolaunched Flow	Record—Run Before Save	✓	Abhishek Hunashyal	9/23/2025, 06:31 PM
BookingConflictChecker	Autolaunched Flow	Record—Run After Save	✓	Abhishek Hunashyal	9/22/2025, 07:33 PM
isBookingConflict	Autolaunched Flow	Record—Run After Save	✓	Abhishek Hunashyal	9/23/2025, 08:08 PM

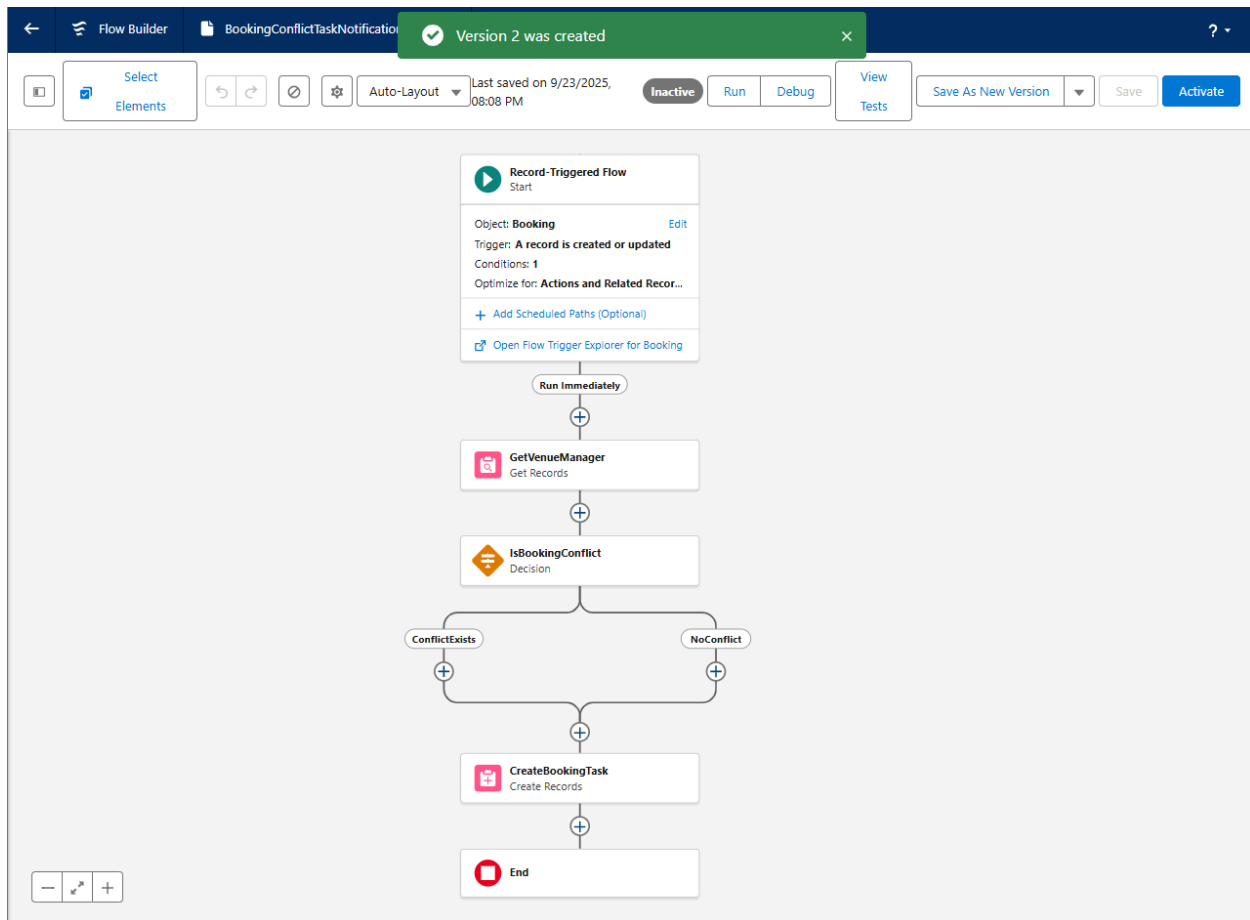
4.8 Tasks

Purpose: Create actionable to-dos automatically.

Example:

- When Booking Conflict Exists → Create Task for Venue Manager to review
- Fields: Subject, Related To (Booking), Assigned To (User), Due Date, Priority

Setup: Flow Builder → Create Records → Set Task fields → Connect to Decision element




4.9 Custom Notifications

Purpose: In-app and mobile notifications for urgent actions.







Steps:

- Setup → Notification Builder → Custom Notifications → New
 - Name: BookingConflictAlert
 - Channels: Desktop, Mobile
- Flow Action: Send Custom Notification
 - Title: “Booking Conflict for {!\$Record.Name}”
 - Body: “Booking at {!\$Record.Venue__c} overlaps with another booking. Please review.”

- Target Record: Booking Id
- Recipients: Venue Manager\



Search Setup



Setup

Home

Object Manager

Q noti

Apps

Mobile Apps

Salesforce

Salesforce Notifications

Environments

Monitoring

API Usage

Notifications

Notification Builder

Custom Notifications

Notification Delivery Settings

Didn't find what you're looking for?
Try using Global Search.

SETUP

Custom Notifications

When you create and use custom notifications, the title and body of the custom push notification may be saved to and processed by Google, Microsoft and/or Apple. Salesforce is not responsible for the privacy and security practices of third-party systems or applications like Google Cloud Messaging or Apple Push Notification Service.

Custom Notification Types

New

Send custom notifications using [Flows](#) or [Process Builder](#)

NOTIFICATION NAME	API NAME	NAMESPACE	DESKTOP	MOBILE	
BookingConflictAlert	BookingConflictAlert		✓	✓	▼
enablement_coaching_feedback_ready	enablement_coaching_feedback_ready		✓		▼