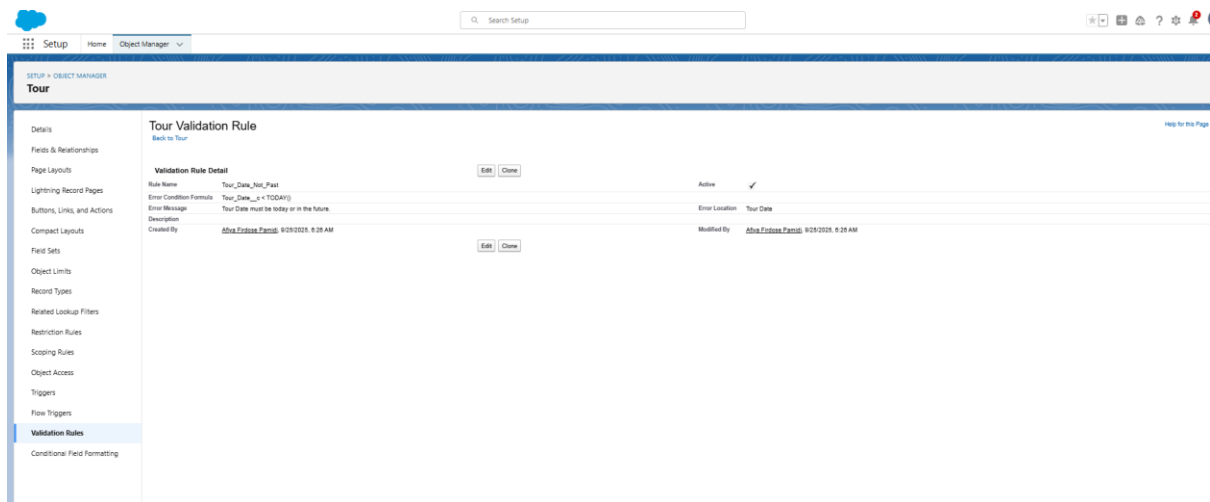


TourFlow: Real Estate Tour and Feedback Automator

Phase 4: Process Automation (Admin)

Validation Rules:

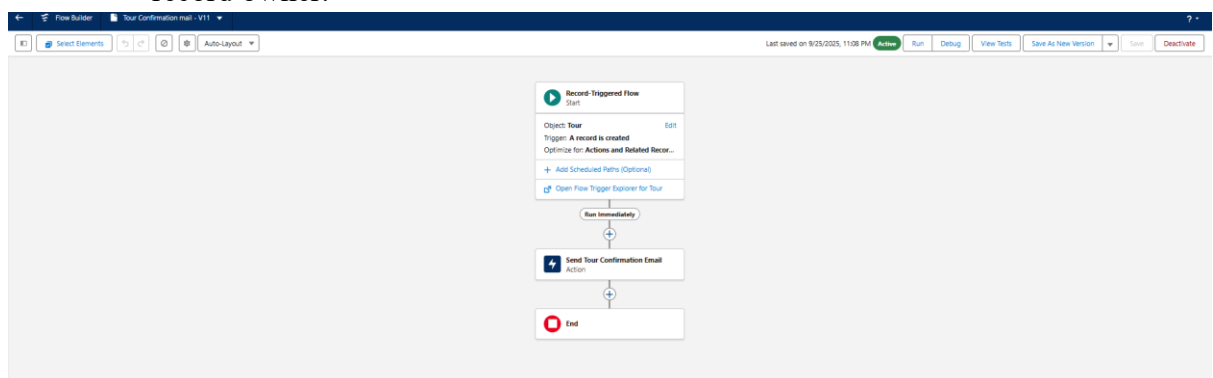
Created a validation rule for tour object which ensures that the **Tour Date** is in the future (greater than TODAY()), preventing users from scheduling a tour in the past.



Flow Builder and Email Alerts:

a. Tour Confirmation

- **Flow Type:** Record-Triggered Flow
- **Trigger:** Runs automatically when a new Tour record is created.
- **Purpose:** To send an instant confirmation email to the client and create a follow-up task for the tour agent.
- **Key Components:**
 - **Send Email Action:** Uses the New Tour Confirmation email template to send an email. The recipient is the Client related to the tour record.
 - **Create Records Action:** Automatically creates a follow-up Task for the Tour record owner.



Why is this message in spam? This message is similar to messages that were identified as spam in the past.

[Report as not spam](#)



Hi harisree,

Thank you for registering for the tour of Mansion

Here are your tour details:

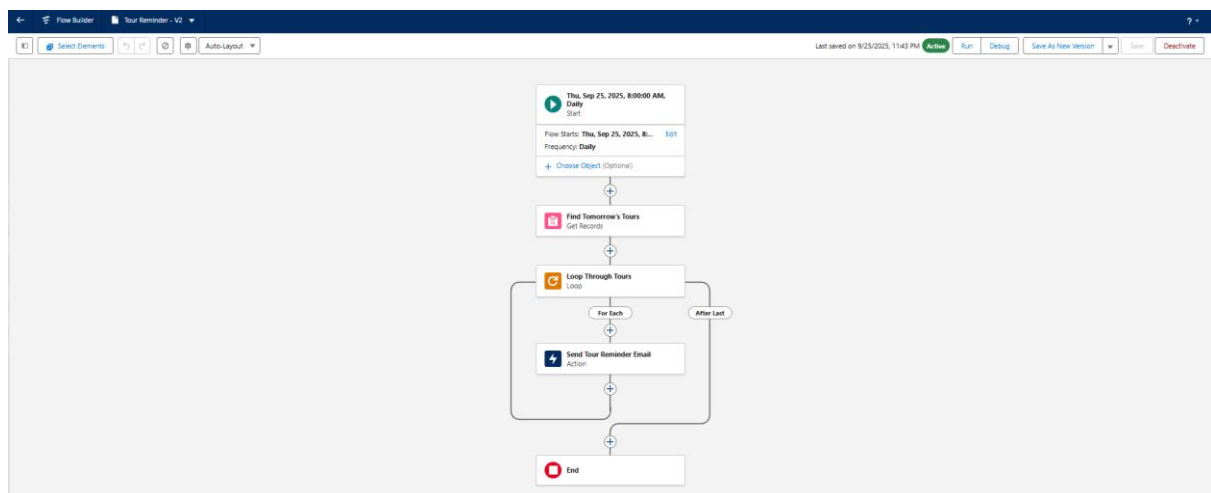
- Date: September 25, 2025
- Time: 23:45:00.000Z
- Location: 451 St.berg, Houston

We look forward to seeing you.

Best regards,
TourFlow

b. Tour Reminder

- **Flow Type:** Scheduled-Triggered Flow
- **Trigger:** Runs daily at a specific time (e.g., 8:00 AM).
- **Purpose:** To send a reminder email to clients for all tours scheduled for the following day.
- **Key Components:**
 - **Get Records:** Finds all Tour records where the Tour Date is tomorrow.
 - **Loop:** Iterates through all the tour records found.
 - **Send Email Action:** Sends the Tour Reminder email to each client.



Reminder: Your Tour is Tomorrow Spam x



Why is this message in spam? This message is similar to messages that were identified as spam in the past.

[Report as not spam](#)



Hi Afiya,

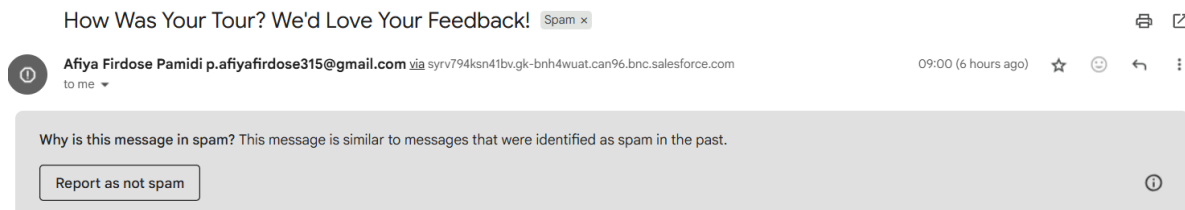
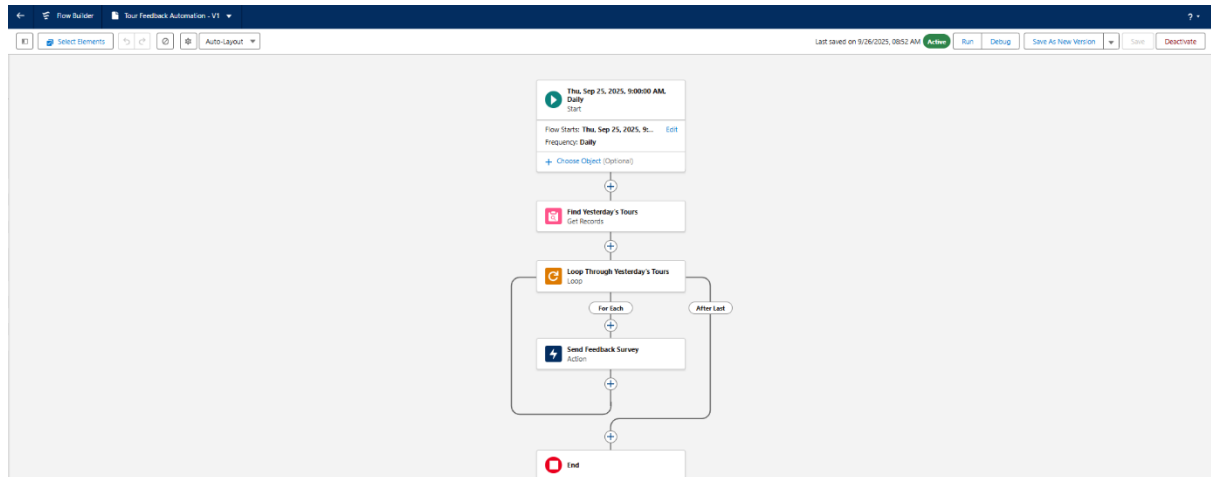
Just a friendly reminder about your upcoming tour:

- Date: September 26, 2025
- Time: {12:45:00.000Z
- Property: Duplex home

Best Regards,
TourFlow

c. Tour Feedback

- **Flow Type:** Scheduled-Triggered Flow
- **Trigger:** Runs daily at a specific time (e.g., 9:00 AM).
- **Purpose:** To send a feedback request email to all clients the day after their tour.
- **Key Components:**
 - **Get Records:** Finds all Tour records where the Tour Date was yesterday.
 - **Loop:** Iterates through all the tour records found.
 - **Send Email Action:** Sends the Tour Feedback email to each client.



Hi harisreej,

Thank you for taking the time to tour Mansion} with us. We would love to hear about your experience. Please reply to this email with any feedback you would like to share. Your thoughts are very important to us.

Best Regards,
TourFlow