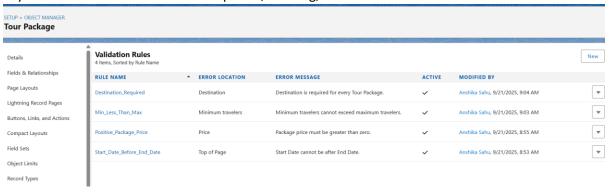
Phase 4: Process Automation (Admin)

Travel & Tourism Management System

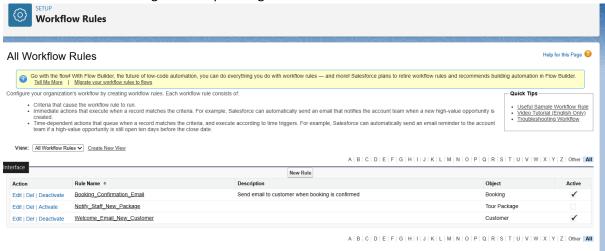
1. Validation Rules

- Implemented rules to ensure data integrity for Bookings and Payments.
- Example: Booking cannot have Travel Date before Booking Date.
- Payment Status must be one of: Completed, Pending, Refunded.



2. Workflow Rules

- Automated email notifications upon booking creation and payment confirmation.
- Workflow triggers to update Booking Status based on Payment received.
- Task creation for Travel Agents on upcoming travel dates.



3. Process Builder

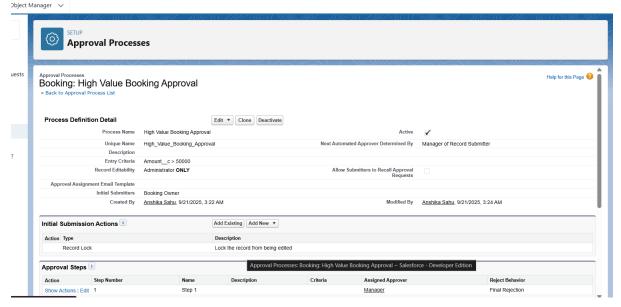
- Created processes for auto-approval of Booking when payment is received.
- Triggered update of Customer record once Booking completed.

Automated status change from Pending to Confirmed based on predefined criteria.



4. Approval Process

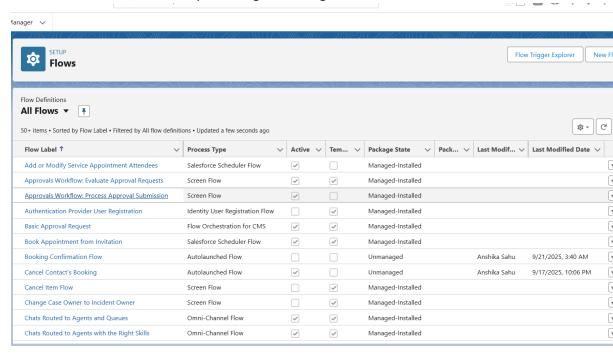
- Defined approval steps for high-value bookings above threshold amount.
- Multi-level approval involving Travel Manager and Finance Officer.
- Email alerts sent to approvers and requesters during approval cycle.



5. Flow Builder

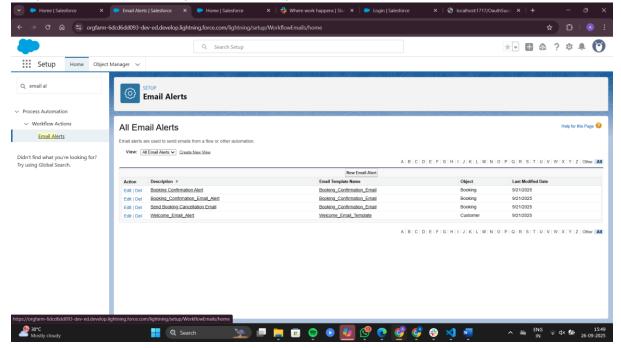
- Workflow Flows used:
 - Screen Flows for customer booking input wizard.
 - Record-Triggered Flows to update related records on modify.
 - Scheduled Flows to send periodic payment reminders.

• Auto-launched Flows for batch processing of booking confirmations.



6. Email Alerts

- Configured alerts for new leads, booking approvals, payment confirmations.
- Templates customized with dynamic fields for personalization.



7. Field Updates

• Automated updates of Booking status fields.

• Sync of Payment status with Booking records.

8. Tasks

- Automatic task assignment to Travel Agents based on booking and follow-up needs.
- Calendar integration for travel dates and customer meetings.

9. Custom Notifications

- Configured push notifications to Salesforce mobile app for critical booking events.
- Alerts for payment overdue and booking cancellation.