

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.

SETUP > OBJECT MANAGER

Tour Package

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Validation Rules

4 Items, Sorted by Rule Name

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY	
Destination_Required	Destination	Destination is required for every Tour Package.	✓	Anshika Sahu, 9/21/2025, 9:04 AM	▼
Min_Less_Than_Max	Minimum travelers	Minimum travelers cannot exceed maximum travelers.	✓	Anshika Sahu, 9/21/2025, 9:03 AM	▼
Positive_Package_Price	Price	Package price must be greater than zero.	✓	Anshika Sahu, 9/21/2025, 8:55 AM	▼
Start_Date_Before_End_Date	Top of Page	Start Date cannot be after End Date.	✓	Anshika Sahu, 9/21/2025, 8:53 AM	▼

New

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.

SETUP

Workflow Rules

All Workflow Rules

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

Configure your organization's workflow by creating workflow rules. Each workflow rule consists of:

Criteria that cause the workflow rule to run.

Immediate actions that execute when a record matches the criteria. For example, Salesforce can automatically send an email that notifies the account team when a new high-value opportunity is created.

Time-dependent actions that queue when a record matches the criteria, and execute according to time triggers. For example, Salesforce can automatically send an email reminder to the account team if a high-value opportunity is still open ten days before the close date.

Quick Tips

Useful Sample Workflow Rule

Video Tutorial (English Only)

Troubleshooting Workflow

View: All Workflow Rules Create New View

Interface

New Rule

Action	Rule Name	Description	Object	Active
<div>Edit Del Deactivate</div>	Booking_Confirmation_Email	Send email to customer when booking is confirmed	Booking	✓
<div>Edit Del Activate</div>	Notify_Staff_New_Package		Tour Package	☐
<div>Edit Del Deactivate</div>	Welcome_Email_New_Customer		Customer	✓

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

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.

Go with the flow! With Flow Builder, the future of low-code automation, you can do everything you do with Process Builder—and more! Salesforce plans to retire Process Builder and recommends building automation in Flow Builder.

Try Flow Builder | Use Migrate to Flow Tool

Process Builder						
<div>Process Builder</div> <div>← Back To Setup ? H</div>						
<div>My Processes</div> <div>3 items</div>						
PROCESS	DESCRIPTION	OBJECT	PROCESS TYPE	LAST MODIFIED	STATUS	ACTIONS
> Booking Cancellation Email Process	Sends a cancellation email when a booking is cancell...	Booking	Record Change	9/21/2025	Active	
> Booking Confirmation Process	Send confirmation email to customer when booking i...	Booking	Record Change	9/21/2025	Active	
> Update_Booking_Status	When a payment is marked Paid, set related booking ...		Record Change	9/20/2025	Inactive	

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.

Object Manager

Approval Processes

Booking: High Value Booking Approval

← Back to Approval Process List

Help for this Page

Process Definition Detail

Process Name

High Value Booking Approval

Active

✓

Unique Name

High_Value_Booking_Approval

Next Automated Approver Determined By

Manager of Record Submitter

Description

Entry Criteria

Amount__c > 50000

Record Editability

Administrator ONLY

Allow Submitters to Recall Approval Requests

☐

Approval Assignment Email Template

Initial Submitters

Booking Owner

Created By

Anshika Sahu, 9/21/2025, 3:22 AM

Modified By

Anshika Sahu, 9/21/2025, 3:24 AM

Initial Submission Actions

Add Existing Add New

Action

Type

Description

Record Lock

Lock the record from being edited

Approval Steps

Approval Processes: Booking: High Value Booking Approval - Salesforce - Developer Edition

Action

Step Number

Name

Description

Criteria

Assigned Approver

Reject Behavior

Show Actions

Edit

1

Step 1

Manager


Final Rejection

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.

manager ▾


Flows
Flow Trigger Explorer
New Flow

Flow Definitions

All Flows ▾ 

50+ items • Sorted by Flow Label • Filtered by All flow definitions • Updated a few seconds ago

Flow Label ↑	Process Type	Active	Tem...	Package State	Pack...	Last Modif...	Last Modified Date
Add or Modify Service Appointment Attendees	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Managed-Installed			
Approvals Workflow: Evaluate Approval Requests	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Approvals Workflow: Process Approval Submission	Screen Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Managed-Installed			
Authentication Provider User Registration	Identity User Registration Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Basic Approval Request	Flow Orchestration for CMS	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Book Appointment from Invitation	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Booking Confirmation Flow	Autolaunched Flow	<input type="checkbox"/>	<input type="checkbox"/>	Unmanaged		Anshika Sahu	9/21/2025, 3:40 AM
Cancel Contact's Booking	Autolaunched Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Unmanaged		Anshika Sahu	9/17/2025, 10:06 PM
Cancel Item Flow	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Change Case Owner to Incident Owner	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Chats Routed to Agents and Queues	Omni-Channel Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Chats Routed to Agents with the Right Skills	Omni-Channel Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			

6. Email Alerts

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

Home | Salesforce | Email Alerts | Salesforce | Home | Salesforce | Where work happens | Salesforce | Login | Salesforce | localhost:1717/DauthS...

orgfarm-6dc6dd093-dev-ed.develop.lightning.force.com/lightning/setup/WorkflowEmails/home

Setup Home Object Manager ▾

email al

Process Automation

Workflow Actions

Email Alerts

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

SETUP Email Alerts

All Email Alerts Help for this Page

Email alerts are used to send emails from a flow or other automation.

View: All Email Alerts Create New View

Action	Description	Email Template Name	Object	Last Modified Date
Edit Del	Booking Confirmation Alert	Booking Confirmation Email	Booking	9/21/2025
Edit Del	Booking Confirmation Email Alert	Booking Confirmation Email	Booking	9/21/2025
Edit Del	Send Booking Cancellation Email	Booking Confirmation Email	Booking	9/21/2025
Edit Del	Welcome Email Alert	Welcome Email Template	Customer	9/21/2025

https://orgfarm-6dc6dd093-dev-ed.develop.lightning.force.com/lightning/setup/WorkflowEmails/home

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Search

ENG IN

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26-09-2025

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.