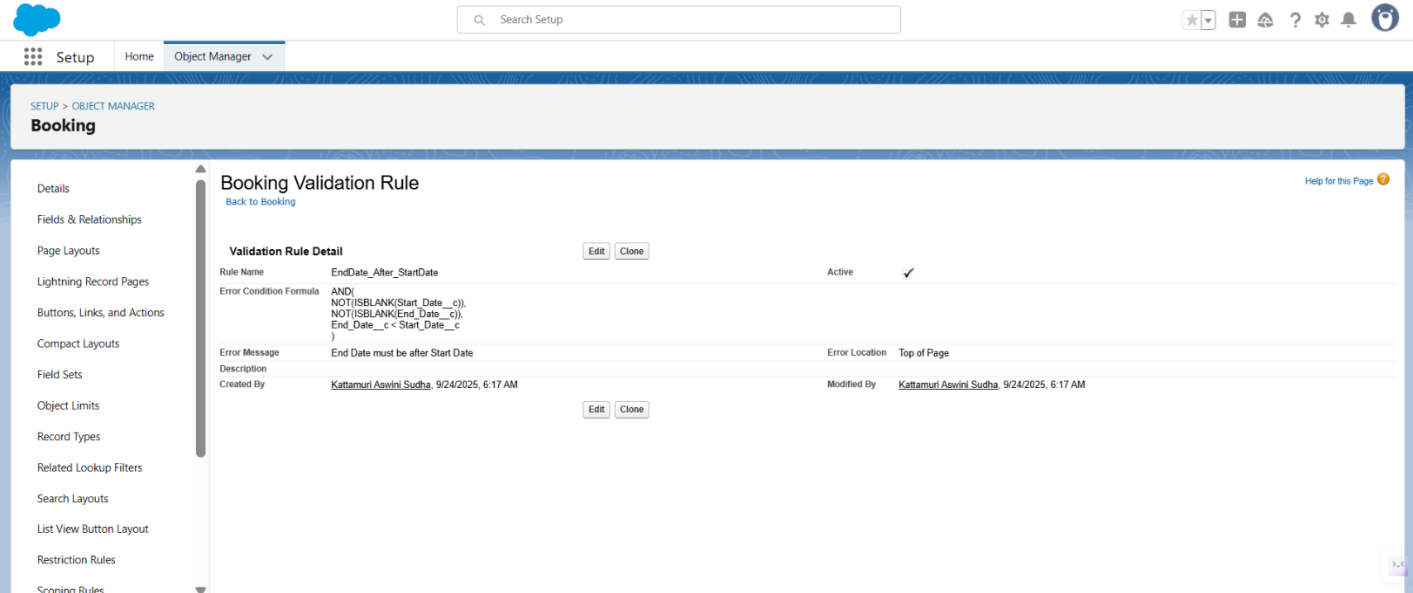


# Phase 4: Process Automation (Admin) - Event Management

## 1. Validation Rules

End Date must be after Start Date.

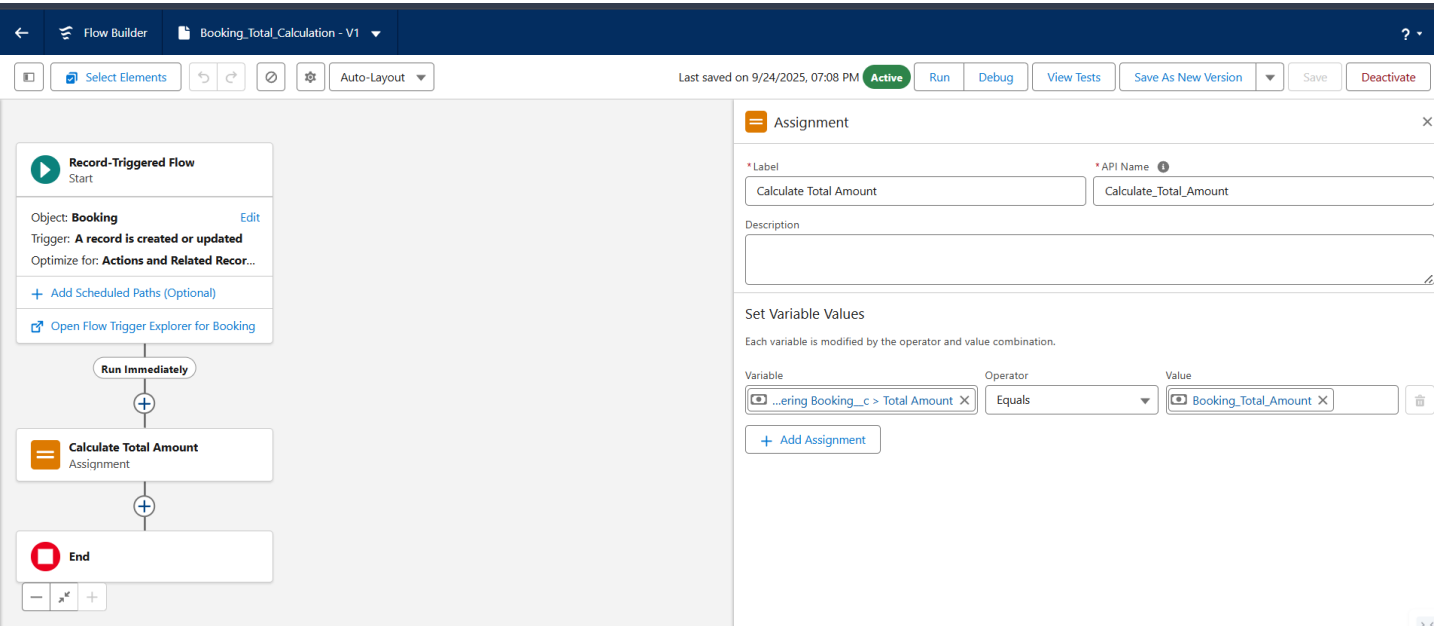
Below is the Screenshort for the **EndDate\_After\_StartDate**



## 2. Flow Builder

Record-Triggered Flow:

- Calculate Total Amount automatically when a Booking record is created or updated.
- Total Amount = Days × Daily Rate + Additional Charges – Discount



## Screen Flow:

- Booking form fields:
  - Customer (Lookup to Contact or Text field)
  - Start Date (Date)
  - End Date (Date)
  - Car / Event Resource (Lookup)
  - Daily Rate (Currency)
  - Additional Charges (Currency)
  - Discount (Currency)
  - Agent (Lookup to User)
- These inputs are captured as Flow variables for creating the Booking record.

The screenshot displays the Salesforce Flow Builder interface for a flow named 'Booking\_Creation\_Form - V1'. The flow is composed of four steps: 'Screen Flow' (Start), 'Booking Form' (Screen), 'Create Booking Record' (Create Records), and 'End'. The 'Create Booking Record' step is currently selected, and its configuration is shown on the right-hand side.

**Create Records Configuration:**

- \*Label:** Create Booking Record
- \*API Name:** Create\_Booking\_Record
- Description:** Creates a new Booking record from the Screen Flow input
- \*How to set record field values:** Manually
- Create a Record of This Object:** Booking
- Set Field Values for the Booking:**
  - Field:** Customer
  - Value:** Customer\_Name1

## 3. Create Booking Record

- Map Screen Flow inputs to the Booking object fields.
- Total Amount is automatically calculated by Record-Triggered Flow.
- Ensure a new record is created each time (ID is blank).

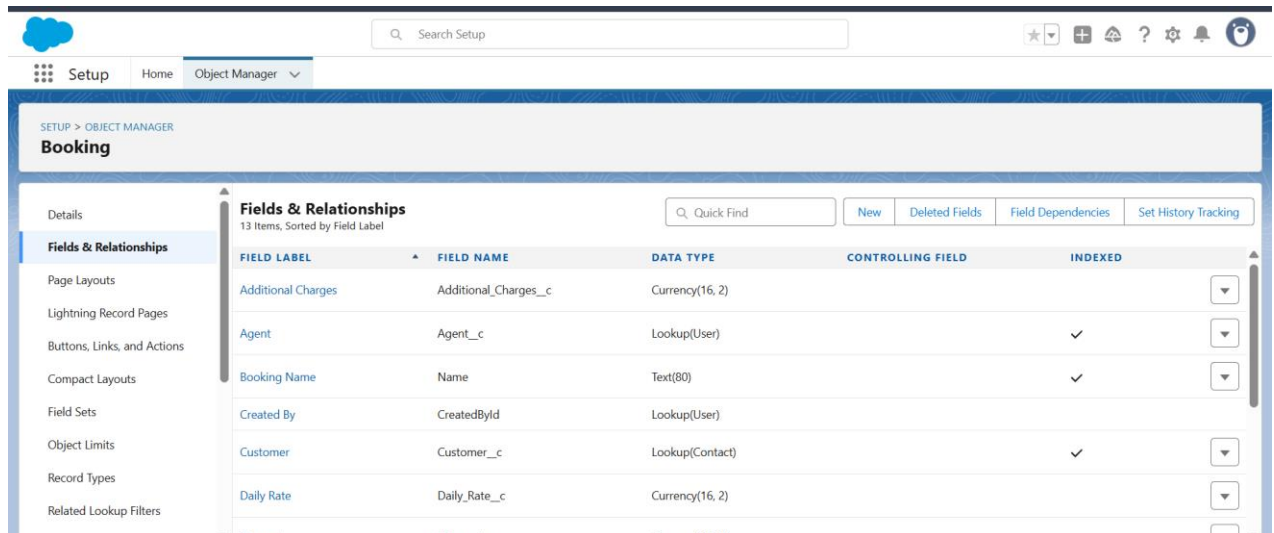
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## 3. Booking Form Fields

Input fields in the Screen Flow:

- Customer (Lookup to Contact or Text field)
- Start Date (Date)
- End Date (Date)

- Car / Event Resource (Lookup)
- Daily Rate (Currency)
- Additional Charges (Currency)
- Discount (Currency)
- Agent (Lookup to User)



The screenshot shows the Salesforce Setup interface. The top navigation bar includes the Salesforce logo, a search bar labeled 'Search Setup', and several utility icons. Below the navigation bar, the 'Setup' menu is expanded, showing 'Home' and 'Object Manager'. The 'Object Manager' page is selected, displaying the 'Booking' object. The left sidebar contains a list of setup options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area is titled 'Fields & Relationships' and shows a list of 13 items, sorted by Field Label. The table below lists the fields and their properties.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Additional Charges	Additional_Charges__c	Currency(16, 2)		
Agent	Agent__c	Lookup(User)		✓
Booking Name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Customer	Customer__c	Lookup(Contact)		✓
Daily Rate	Daily_Rate__c	Currency(16, 2)		
Discount	Discount__c	Currency(16, 2)		

## 5. Approval Process: High Value Booking Approval

- Criteria: Booking amount > ₹50,000
- Initial Submitters: Booking Owner
- Approval Steps: Step 1 assigned to Manager
- Final Approval Actions:
  - Update Booking Status to “Confirmed”
  - Send Email Alert to Customer
  - Create Task for Agent to prepare the car
  - Send Email Alert to Agent

Cloud logo | Search Setup | Home | Object Manager

Approval Processes

Event: High\_Budget\_Event\_Approval

Process Definition Detail

Process Name	High_Budget_Event_Approval	Active	<input type="checkbox"/>
Unique Name	High_Budget_Event_Approval	Next Automated Approver Determined By	
Description			
Entry Criteria			
Record Editability	Administrator ONLY	Allow Submitters to Recall Approval Requests	<input type="checkbox"/>
Approval Assignment Email Template			
Initial Submitters	Event Owner		
Created By	Kattamuri Aswini Sudha, 9/24/2025, 1:46 AM	Modified By	Kattamuri Aswini Sudha, 9/24/2025, 1:46 AM

Initial Submission Actions

Action	Type	Description
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## 6. Email Alerts

- Customer Email: Sent after approval with booking details and total amount.

Cloud logo | Search Setup | Home | Object Manager

Email Alerts

Booking Approval Email Alert

Email Alert Detail

Description	Booking Approval Email Alert	Email Template	Scheduled Service Appointment Confirmation Email
Unique Name	Booking_Approval_Email_Alert	Object	Booking
From Email Address	Current User's email address		
Recipients	Booking Owner		
Additional Emails			
Created By	Kattamuri Aswini Sudha, 9/24/2025, 7:11 AM	Modified By	Kattamuri Aswini Sudha, 9/24/2025, 7:11 AM

Rules Using This Email Alert

This alert is currently not used by any rules

Approval Processes Using This Email Alert

## 7. Tasks

- Subject: Prepare Car for Booking
- Assigned To: Agent
- Status: Not Started
- Priority: Normal
- Due Date: Optional (Booking Start Date)

- Description: Prepare the car for the upcoming

Setup

Home

Object Manager

approval

Mass Transfer

Approval Requests

Feature Settings

Approval Settings

Process Automation

Approval Processes

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

Approval Processes

Initial Submission Actions

Add Existing

Add New

Action	Type	Description
Record Lock		Lock the record from being edited

Approval Steps

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
Show Actions   Edit	1	Manager Approval Step	Approval step for bookings above ₹50,000, assigned to Manager of the Agent.		Manager	Final Rejection

Final Approval Actions

Add Existing

Add New

Action	Type	Description
Edit	Record Lock	Lock the record from being edited
Edit   Remove	Task	Prepare Car for Booking
Edit   Remove	Field Update	Set Booking Status Confirmed

Final Rejection Actions

Add Existing

Add New

Phase 4 summary: After setting up Validation Rules, Total Amount calculation, Screen Flow, Create Records, Approval Process, Email Alerts, and Tasks, your Event Management booking process is fully automated.