

Project Title: Venue Connect CRM

Phase 4 — Process Automation (Admin)

4.1 Validation Rules

Purpose: Enforce data integrity before records are saved.

Minimum Examples:

1. End Date/Time must be after Start Date/Time

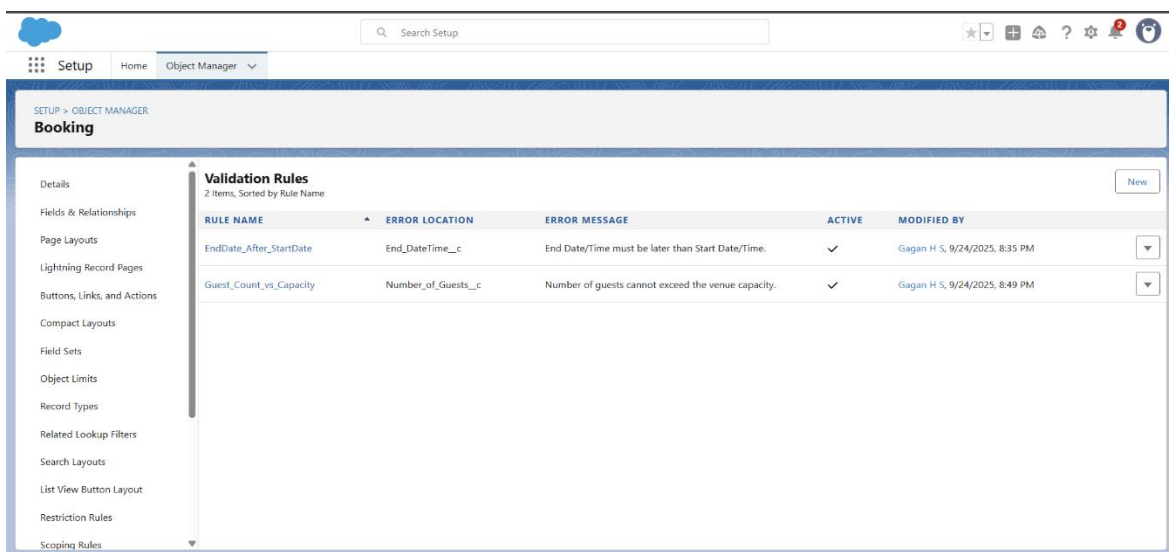
- Object: Booking
- Rule: End_DateTime__c > Start_DateTime__c
- Error Message: “End Date/Time must be after Start Date/Time.”

2. Number of Guests ≤ 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 → Add error message → Save & Activate



4.2 Workflow Rules (*Legacy, optional*)

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

Minimum Example:

- Send email when Booking is Confirmed
 - Object: Booking
 - Rule Criteria: Status__c = "Confirmed"
 - Immediate Actions: Email Alert → Booking Confirmation (pre-created)

Setup:

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

The screenshot shows the Salesforce Setup interface. The left sidebar contains navigation links: Setup, Home, Object Manager, Process Automation (Workflow Actions, Email Alerts, Field Updates, Outbound Messages, Send Actions, Tasks), Workflow Rules (selected), User Interface, Console Settings (Workspace Page, Loading Preference), and Translation Workbench (Export, Import, Translate, Translation Language Settings). The main content area is titled 'Workflow Rules' and displays 'All Workflow Rules'. A yellow banner at the top of the main area states: '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](#)'. Below this, a section explains that workflow rules consist of criteria, immediate actions, and time-dependent actions. A table lists two existing rules:

Action	Rule Name ↑	Description	Object	Active
Edit Del Activate	Booking — Send Confirmation Email	When Booking Status becomes Confirmed send a confirmation email to the Booking Contact.	Booking	<input type="checkbox"/>
Edit Del Deactivate	Booking_Confirmed_Notification	Sends a confirmation email when a booking status changes to Confirmed.	Booking	<input checked="" type="checkbox"/>

At the bottom right of the table, there is a 'New Rule' button and a 'View: All Workflow Rules' dropdown menu.

4.3 Process Builder

Purpose: Require manager approval for corporate or VIP bookings.

Steps:

1. Setup → Approval Processes → New → Select Object: Booking
2. Entry Criteria: RecordType = Corporate_Event AND Amount__c > 10000
3. Approver: Manager / Venue Manager
4. Approval Steps:
 - Approve → Status__c = Approved
 - Reject → Status__c = Rejected
5. Optional Actions: Email Alerts / Field Updates

Setup:

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

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 [← Back To Setup](#) [? Help](#)

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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 configuring Approval Processes. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area is titled 'Approval Processes' and is filtered by the 'Booking' object. A yellow box provides instructions for creating an approval process. Below this, a table lists active approval processes. One process, 'High Value Booking Approval', is shown with a process order of 1. The table has columns for Action, Process Order, Approval Process Name, and Description.

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

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'. Below this, there's a search bar and a 'New Flow' button. The main table lists various flow definitions. The table has columns: Flow Label, Process Type, Active, Template, Package State, Package Name, Last Modified By, and Last Modified Date. The flows listed include 'Add or Modify Service Appointment Attendees', 'Set Payment Rates', 'Create Waitlist', 'Enroll or Unenroll Service Appointment Attendees', 'Outbound New Appointment', 'Inbound New Guest Appointment', 'Inbound Cancel Appointment', 'Inbound Modify Appointment', 'Inbound New Appointment', 'Book Appointment from Invitation', 'Generate Appointment Invitation', 'Modify Guest Service Appointment', 'Outbound Modify Appointment', 'Pay for Service Appointments', 'Reassign Multiple Service Appointments', 'Send Appointment Invitation to Actionable List Members', 'Process Simple Approval', 'Daily Reminder', and 'Update Booking'.

Flow Label	Process Type	Active	Template	Package State	Package Name	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

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](#)

[New Email Alert](#)

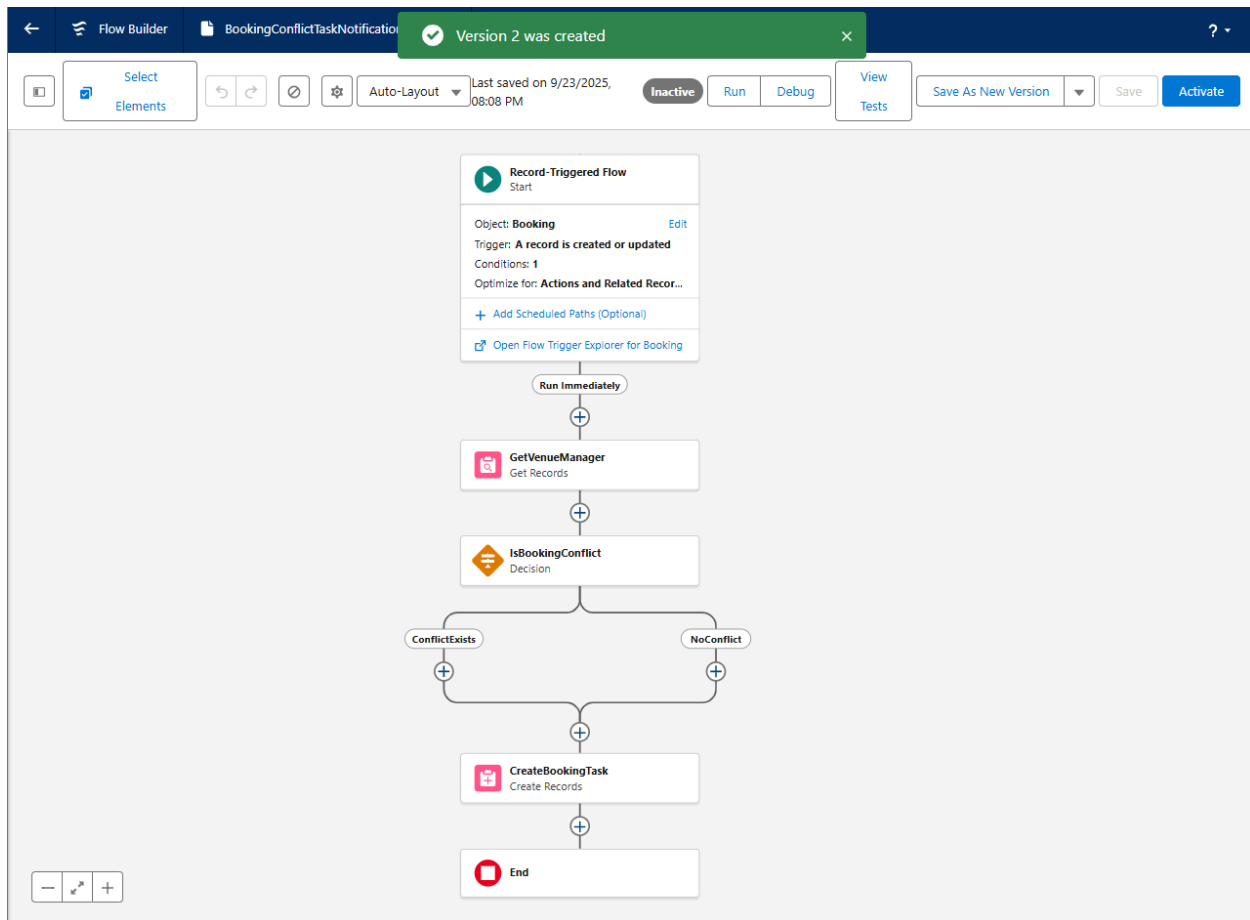
Action	Description ↑	Email Template Name	Object	Last Modified Date
Edit Del	Booking Confirmation Alert	Booking Confirmation Classic	Booking	9/22/2025
Edit Del	Booking Confirmation Alert	Booking Approved	Booking	9/22/2025
Edit Del	Booking Confirmation Alert1	Booking Confirmation Classic	Booking	9/22/2025
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 ≥ Booking Amount
- Object: Booking → Workflow/Process → Field Update → Save & Activate




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\



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Notification Builder


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 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		✓		▼