

## Phase 4: Process Automation (Admin)

### Project: Visitor Check-In System for Offices

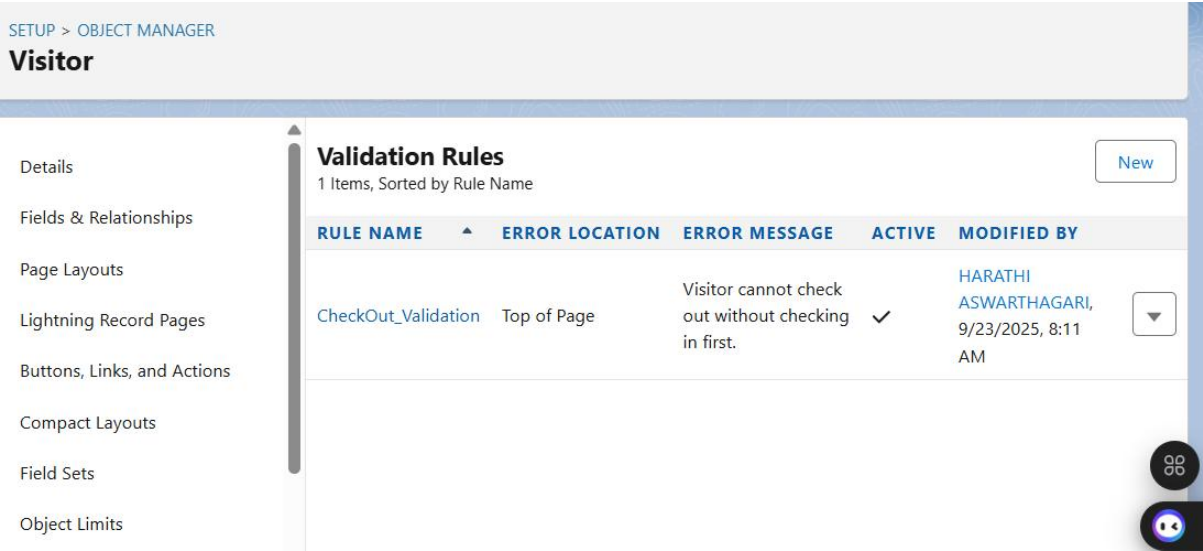
#### Validation Rules

- Validation rules were created to ensure correct and consistent data entry. For example, a visitor cannot be checked out before being checked in. This rule prevents receptionists from accidentally entering a check-out time without first logging a check-in.

**FORMULA USED:**

```
AND(  
  ISBLANK(Visitor_Check_In_Time__c),  
  NOT(ISBLANK(Visitor_Check_Out_Time__c))  
)
```

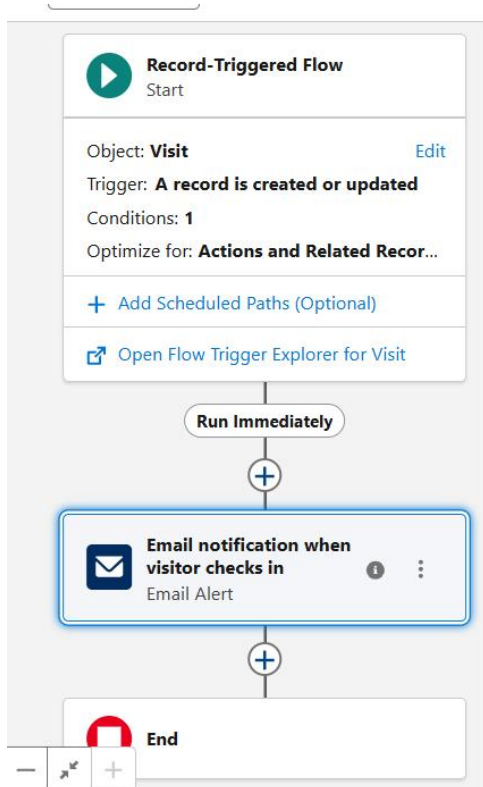
*NOTE: This ensures data integrity and avoids errors in reporting visitor duration.*



#### Workflow Rules

Workflow rules were used to send automatic notifications to the host employee whenever their visitor checked in. This reduced the dependency on receptionists making manual calls.

For example, once the visitor record was saved with a check-in time, an email alert was triggered to inform the host that their guest had arrived.



SETUP > OBJECT MANAGER

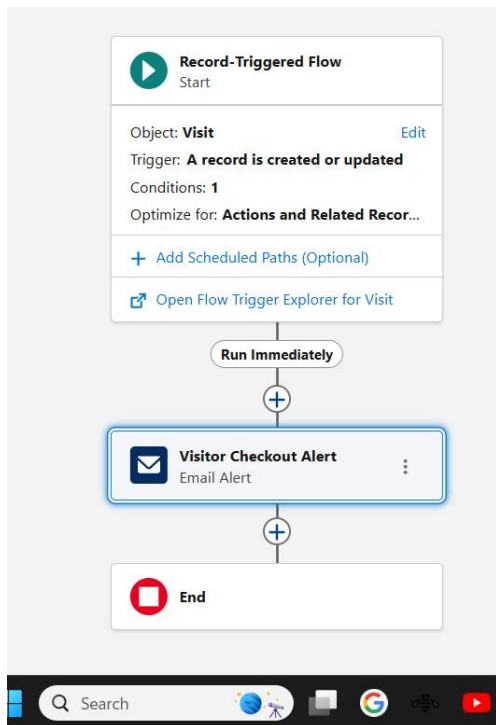
### Visitor

Flow Label	Process Type	Trigger	Active	Last Modified By	Last Modified Date
Pending Approval mail	Autolaunched Flow	Record—Run After Save	✓	HARATHI ASWARTHAGARI	9/24/2025, 07:02 PM
Visitor Approval Cancelled	Autolaunched Flow	Record—Run After Save	✓	HARATHI ASWARTHAGARI	9/24/2025, 07:06 PM
Visitor CheckIn	Autolaunched Flow	Record—Run After Save	✓	HARATHI ASWARTHAGARI	9/24/2025, 06:43 PM
Visitor CheckOut	Autolaunched Flow	Record—Run After Save	✓	HARATHI ASWARTHAGARI	9/24/2025, 06:50 PM

## Process Builder

- Process Builder was implemented to handle more complex, conditional logic. One use case was updating the Visitor Status field to “Checked Out” once the receptionist entered the check-out time.

This avoided manual updates to the status field and ensured real-time accuracy of visitor records.



## Approval Process


- For high-security organizations, certain visitors required approval from the **Security Manager** before entry was granted. An approval process was created so that when a receptionist logged such a visitor, the record was routed for approval before the system confirmed the check-in.

This ensured compliance with security protocols and reduced unauthorized entries.

Active Approval Processes <span>Reorder</span>			
Action	Process Order	Approval Process Name	Description
<a href="#">Edit</a>   <a href="#">Deactivate</a>	<input type="text" value="1"/>	<u>Visitor Check-In Approval</u>	Host must approve visitor before check-in.

## Flow Builder


- Screen Flow: Receptionist enters visitor details.
- Record-Triggered Flow: Automatically calculate visitor duration.
- Auto-Launched Flow: Update status in the background.



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Visitor

Delivery


Visitor Check-In Time

9/18/2025, 12:00 PM

Visitor Check-Out Time

9/18/2025, 1:15 PM

Host Employee



HARATHI ASWARTHAGARI

Purpose of visit

Delivery

ID Proof Number

Gender

Female

Age

9/25/2025

Visitor Duration


1.25

Status

Visitor Name

trisha kaal

Last Modified By



HARATHI ASWARTHAGARI

9/18/2025, 10:09 AM

Created By

Its calculates the time duration automatically after filling the checkIn and checkout form

## Email Alerts

- Welcome emails are sent to visitors after check-in, confirming meeting details.

Email Alerts			
All Email Alerts			
Email alerts are used to send emails from a flow or other automation.			
View: <span>All Email Alerts</span> <a href="#">Create New View</a>			
New Email Alert			
Action	Description	Email Template Name	Object
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Email notification when visitor approval is rejected</a>	Rejection Email	Visitor
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Email notification when visitor checks in</a>	Visit CheckIn Alert	Visit
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Visitor Approval</a>	Visit CheckIn Alert	Visitor
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Visitor Approval mail</a>	Approval Email Letterhead	Visitor
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Visitor Checkout Alert</a>	Visit CheckOut Alert	Visit
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">visitor checks in</a>	Visit CheckIn Alert	Visitor
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Visitor checks out</a>	Visit CheckOut Alert	Visitor
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Visitor Rejection</a>	Rejection Email	Visitor
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Visitor Rejection mail</a>	Rejection Email	Visitor

## Field Updates

Automatically mark Status\_\_c = Checked In when the receptionist completes the check-in flow.

The screenshot shows the Salesforce Flow Builder interface for a flow named 'Visitor Record Flow - V1'. The flow diagram on the left includes a 'Screen Flow Start' step, followed by a 'Screen Properties' step, then a 'Record' step (highlighted with a blue border), and finally an 'End' step. The 'Record' step is configured to 'Create Records'. The right-hand panel shows the configuration for the 'Record' step. Under 'Create Records', the 'How to set record field values' is set to 'Manually'. The 'Object' is set to 'Visitor'. The 'Set Field Values for the Visitor' section shows five fields being mapped to values from the 'Screen Properties' step: 'Purpose of visit' is mapped to 'Screen Properties > Purpose Of Visit', 'Visitor Email' is mapped to 'Screen Properties > Visitor Email > Required', 'Visitor Name' is mapped to 'Screen Properties > Visitor Name', 'Visitor Phone Number' is mapped to 'Screen Properties > Visitor Phone Number > Required', and 'Status' is mapped to 'Checked In'. There is an 'Add Field' button and a checkbox for 'Manually assign variables (advanced)'.

After filling form after running the flow

The screenshot shows the record view for the 'Visitor Record Flow - V1' flow. The record is displayed as a list of fields with their corresponding values. The fields and values are: 'Visitor Email' (adeline@gmail.com), 'Visitor Phone Number' ((123) 456-7890), 'Visitor Check-In Time', 'Visitor Check-Out Time', 'Host Employee', 'Purpose of visit' (Meeting), 'ID Proof Number', 'Gender', 'Age', 'Visitor Duration', 'Status' (Checked In), 'Visitor Name' (adeline), and 'Created By' (HARATHI ASWARTHAGARI, 9/25/2025, 8:32 AM). The 'Status' field is highlighted in blue. The 'Created By' field is also highlighted in blue. The record is created by HARATHI ASWARTHAGARI on 9/25/2025 at 8:32 AM. The 'Last Modified By' field is also HARATHI ASWARTHAGARI on 9/25/2025 at 8:32 AM.

Tasks

- Create a follow-up task for host employees when a visitor checks in.

Custom Notifications

- Push notification to the host employee’s Salesforce mobile app when a visitor arrives.

Email Alerts

All Email Alerts

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
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Email notification when visitor approval is rejected</a>	<a href="#">Rejection Email</a>	Visitor
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Email notification when visitor checks in</a>	<a href="#">Visit_CheckIn_Alert</a>	Visit
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Visitor Approval</a>	<a href="#">Visit_CheckIn_Alert</a>	Visitor
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Visitor Approval mail</a>	<a href="#">Approval Email Letterhead</a>	Visitor
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Visitor Checkout Alert</a>	<a href="#">Visit_CheckOut_Alert</a>	Visit
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">visitor checks in</a>	<a href="#">Visit_CheckIn_Alert</a>	Visitor
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Visitor checks out</a>	<a href="#">Visit_CheckOut_Alert</a>	Visitor
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Visitor Rejection</a>	<a href="#">Rejection Email</a>	Visitor
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Visitor Rejection mail</a>	<a href="#">Rejection Email</a>	Visitor