Phase 4: Process Automation (Admin) Documentation

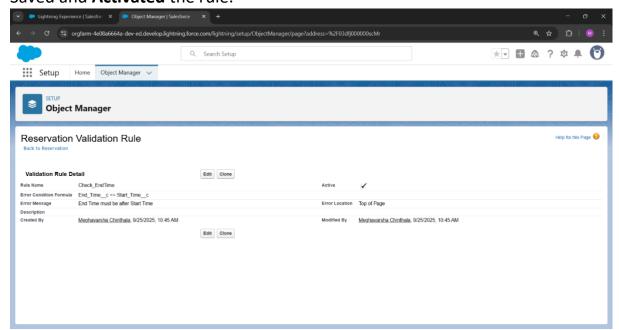
Goal:

Automate the Parking Slot Reservation system so that validations, approvals, notifications, and calculations happen automatically in Salesforce without manual work.

1 Validation Rule: End Time must be after Start Time

Steps followed:

- Opened Setup → Object Manager → Reservation → Validation Rules → New.
- 2. Entered Rule Name: Check_EndTime.
- 3. Added formula:
- 4. End_Time__c <= Start_Time__c
- 5. Added Error Message: "End Time must be after Start Time."
- 6. Saved and **Activated** the rule.

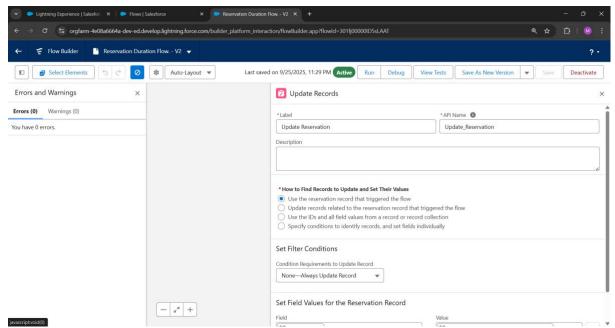


Result: Salesforce now stops users from entering an End Time earlier than the Start Time.

2 Record-Triggered Flow: Auto Calculate Reservation Duration

Steps followed:

- 1. Went to **Setup** → **Flows** → **New Flow**.
- 2. Selected **Record-Triggered Flow**.
- 3. Object = Reservation. Trigger = When record is created or updated.
- 4. Added Assignment Element:
 - o Formula: {!\$Record.End_Time__c \$Record.Start_Time__c}
 - Stored the value in Total_Duration__c field.
- 5. Added **Update Records Element** to update the reservation with this calculated duration.
- 6. Saved Flow as Reservation Duration Flow and Activated it.



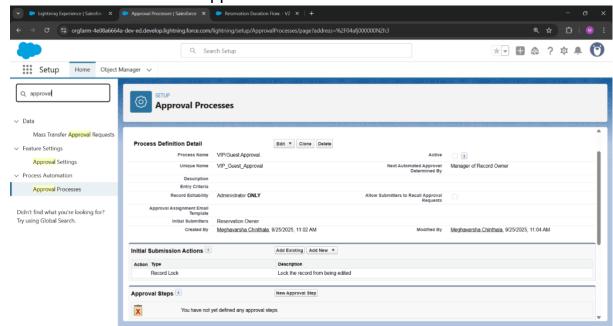
Result: Duration is now calculated automatically when a reservation is created or edited.

3 Approval Process: VIP/Guest Reservations

Steps followed:

1. Went to Setup → Approval Processes → New Approval Process → Standard Wizard.

- 2. Selected Object = Reservation.
- 3. Entry Criteria: Slot_Type__c = VIP OR Guest.
- 4. Assigned Approver = Manager Role.
- 5. Final Approval Action = Update Status = Approved + Send Email.
- 6. Final Rejection Action = Update Status = Rejected.
- 7. Saved and **Activated** the Approval Process.



Result: Reservations for VIP/Guest slots now go to a Manager for approval.

4 Email Alert: Reservation Confirmation

Steps followed:

- 1. Created a new Email Template with subject "Reservation Confirmed."
- 2. Added merge fields (Employee name, Slot, Start Time).
- 3. Went to **Setup** → **Email Alerts** → **New**.
- 4. Selected Object = Reservation.

5. Linked the email alert to the Approval Process (on approval, send con * 🕶 🖪 😂 ? 🌣 📮 👩 Setup Home Object Manager V Q email temp Classic Email Templates Classic Email Templates Help for this Page Lightning Email Templates Didn't find what you're looking for? Email Template Detail Edit Delete Clone Email Templates from Salesforce Unfiled Public Classic Email Templates Last Used Date Encoding Unicode (UTF-8)

Author Meghavarsha Chinthala [Change] Created By Meghavarsha Chinthala, 9/25/2025, 11:07 AM Modified By Meghavarsha Chinthala, 9/25/2025, 11:07 AM Edit Delete Clone Email Template Send Test and Verify Merge Fields Plain Text Preview ur parking slot is confirmed for (!Reservation c.Start Time c). *- • • • • • *** Setup Home Object Manager V © Email Alerts Process Automation Workflow Actions ffgdds Email Alerts Rules Using This Email Alert [0] | Approval Processes Using This Email Alert [0] | Entitlement Processes Using This Email Alert [0] Didn't find what you're looking for? Try using Global Search.

Result: Employees automatically get an email confirmation after approval.

Edit Delete Clone

Object Reservation

Modified By Meghavarsha Chinthala, 9/25/2025, 11:10 AM

5 Task for Security Staff

Steps followed:

- 1. Edited the existing Flow (Reservation Duration Flow).
- 2. Added a Create Records Element → Task.

From Email Address Current User's email address
Recipients User: Employee User

Rules Using This Email Alert

Approval Processes Using This Email Alert

This alert is currently not used by any approval process

Created By Meghavarsha Chinthala, 9/25/2025, 11:10 AM

3. Fields configured:

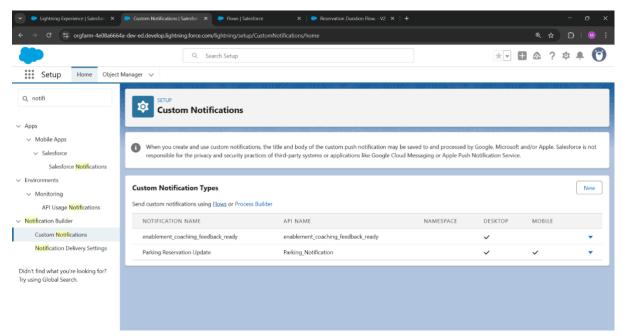
- Subject = Validate Parking Entry
- Assigned To = Security Staff User
- Related To = Reservation Id
- 4. Connected this element after the Approval step.
- 5. Saved and Activated.

Result: Security team gets an automatic Task to verify employee entry.

6 Custom Notification: Notify Employee & Security

Steps followed:

- 1. Went to **Setup** → **Notification Builder** → **Custom Notifications** → **New**.
- 2. Created Notification: Parking Reservation Update.
- 3. Edited Flow → Added Action → Send Custom Notification.
- 4. Selected recipients = Employee + Security.
- 5. Message = "Your parking reservation has been approved."
- 6. Saved and Activated.



Result: Employees and security staff get in-app/mobile push notifications after approval.

Outcome of Phase 4

- Validation ensures data accuracy.
- Reservation duration is auto-calculated.
- VIP/Guest reservations go through Manager approval.
- Employees receive confirmation emails.
- Security staff get tasks to verify entries.
- Real-time notifications are sent to all concerned users.