

Phase 4: Process Automation (Admin) Documentation

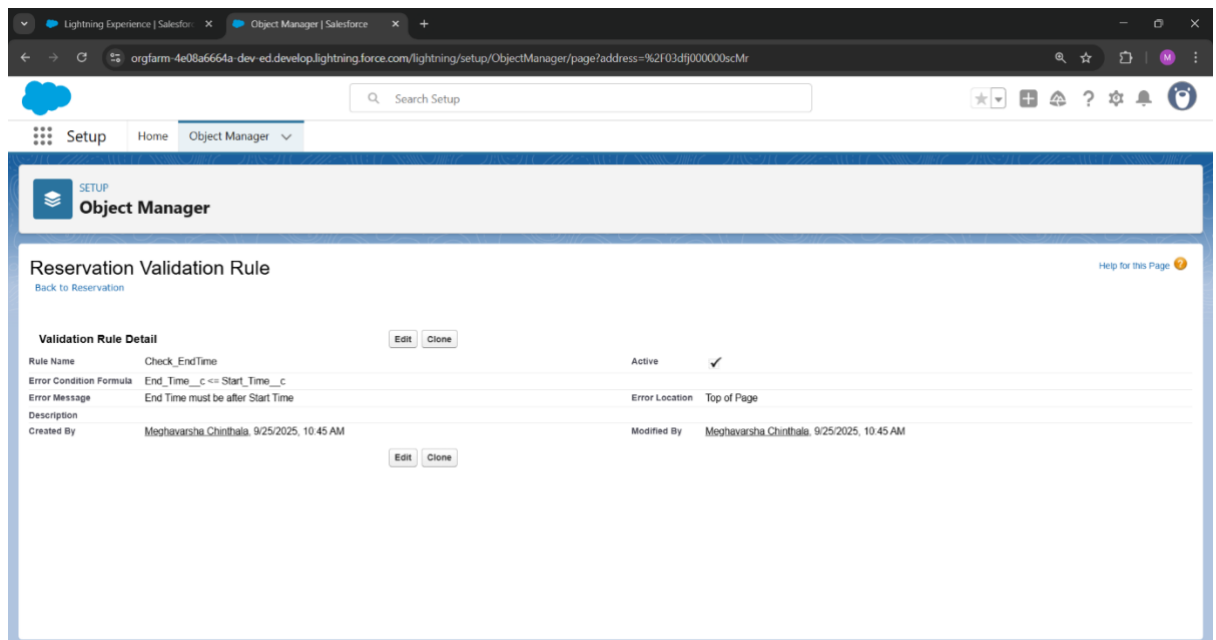
Goal:

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:

1. Opened **Setup** → **Object Manager** → **Reservation** → **Validation Rules** → **New**.
2. Entered Rule Name: Check_EndTime.
3. Added formula:
4. $\text{End_Time_c} \leq \text{Start_Time_c}$
5. Added Error Message: *"End Time must be after Start Time."*
6. Saved and **Activated** the rule.

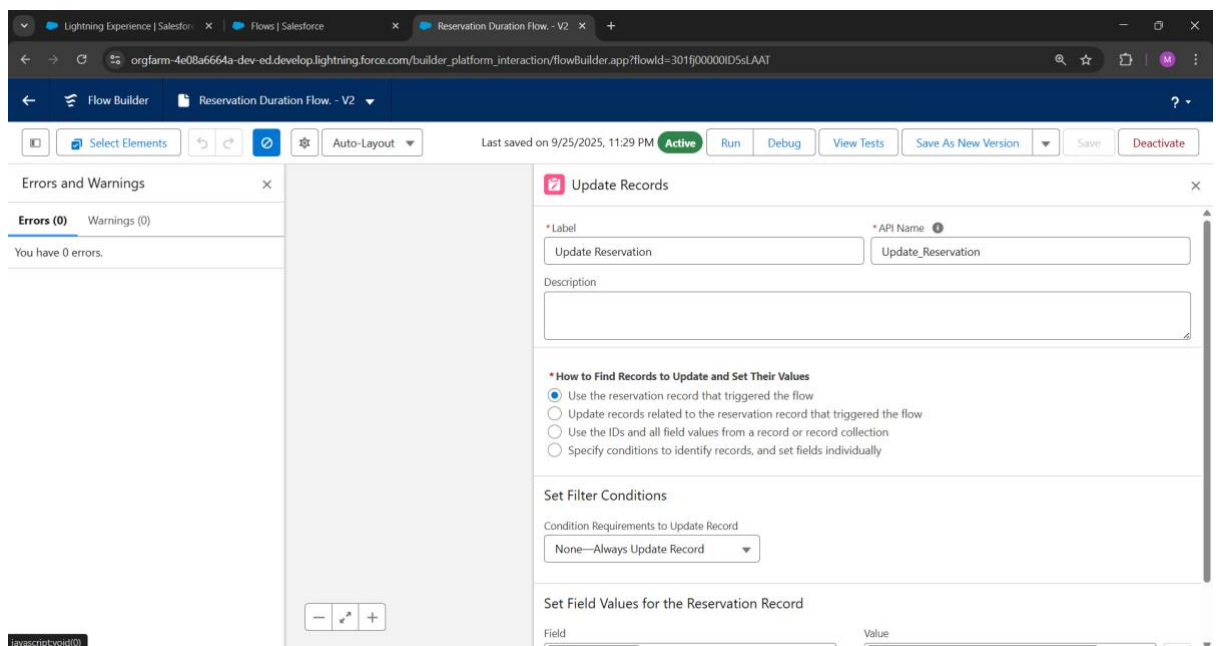


Result: Salesforce now stops users from entering an End Time earlier than the Start Time.

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**:
 - 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.



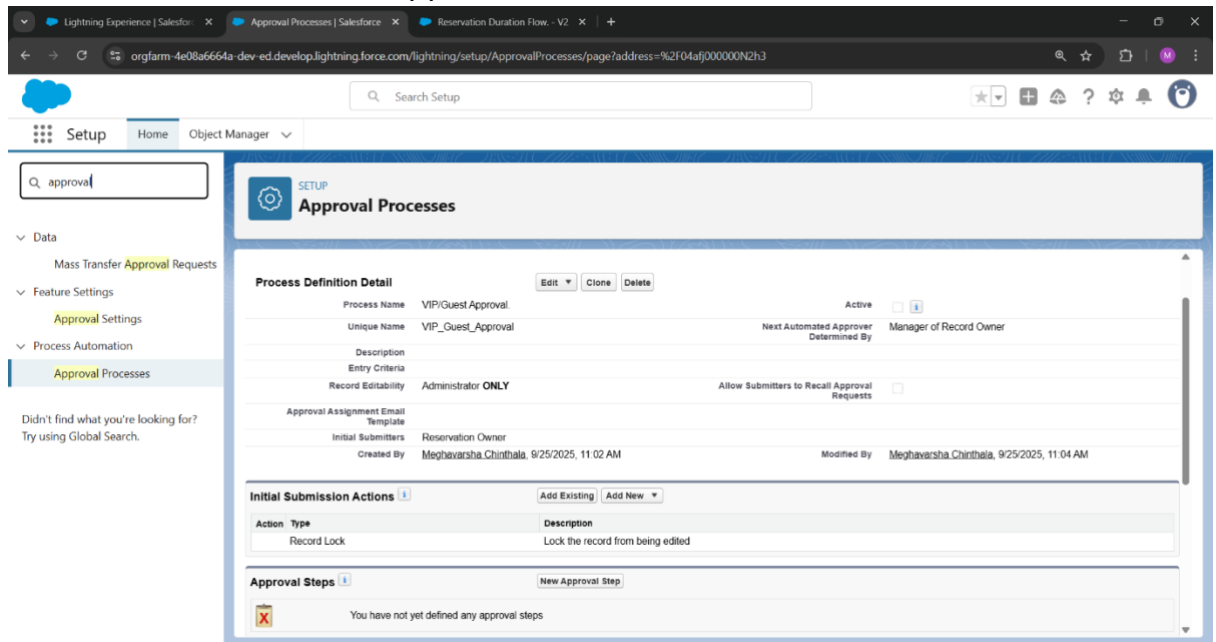
Result: Duration is now calculated automatically when a reservation is created or edited.

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.



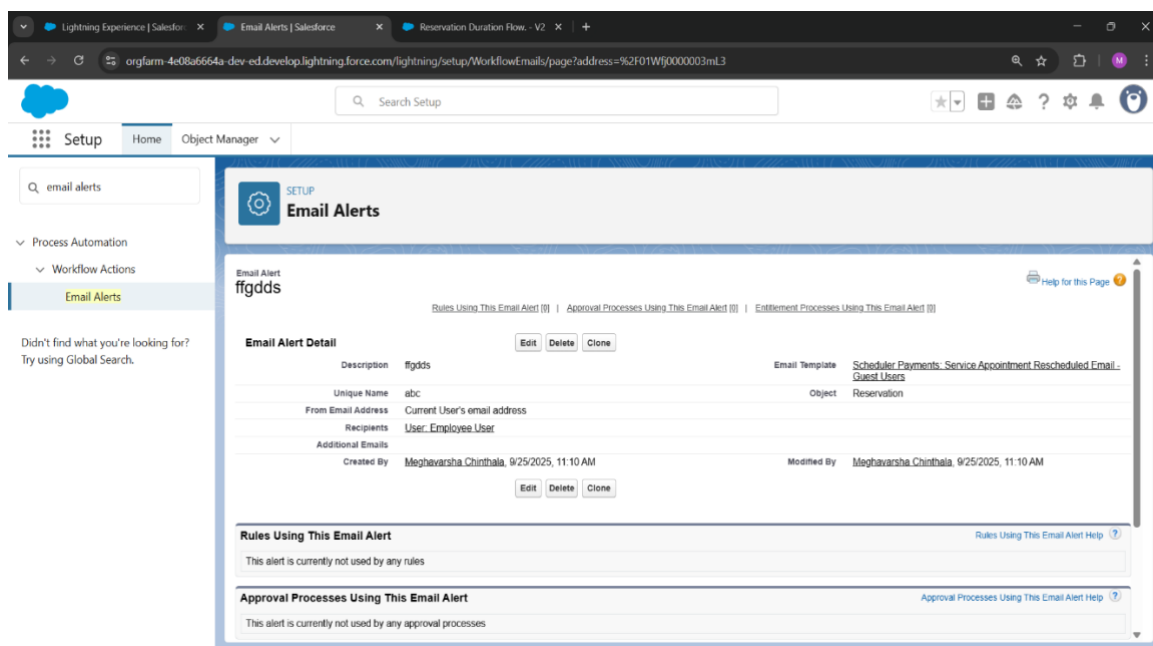
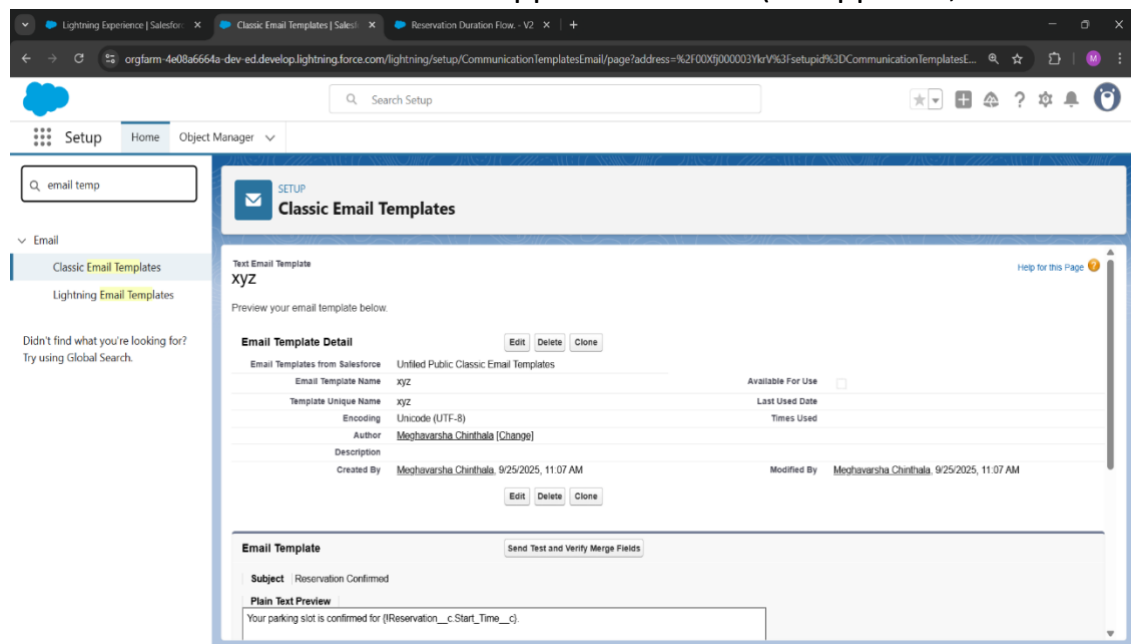
Result: Reservations for VIP/Guest slots now go to a Manager for approval.

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



Result: Employees automatically get an email confirmation after approval.

5 Task for Security Staff

Steps followed:

1. Edited the existing Flow (Reservation Duration Flow).
2. Added a **Create Records Element** → **Task**.
3. Fields configured:

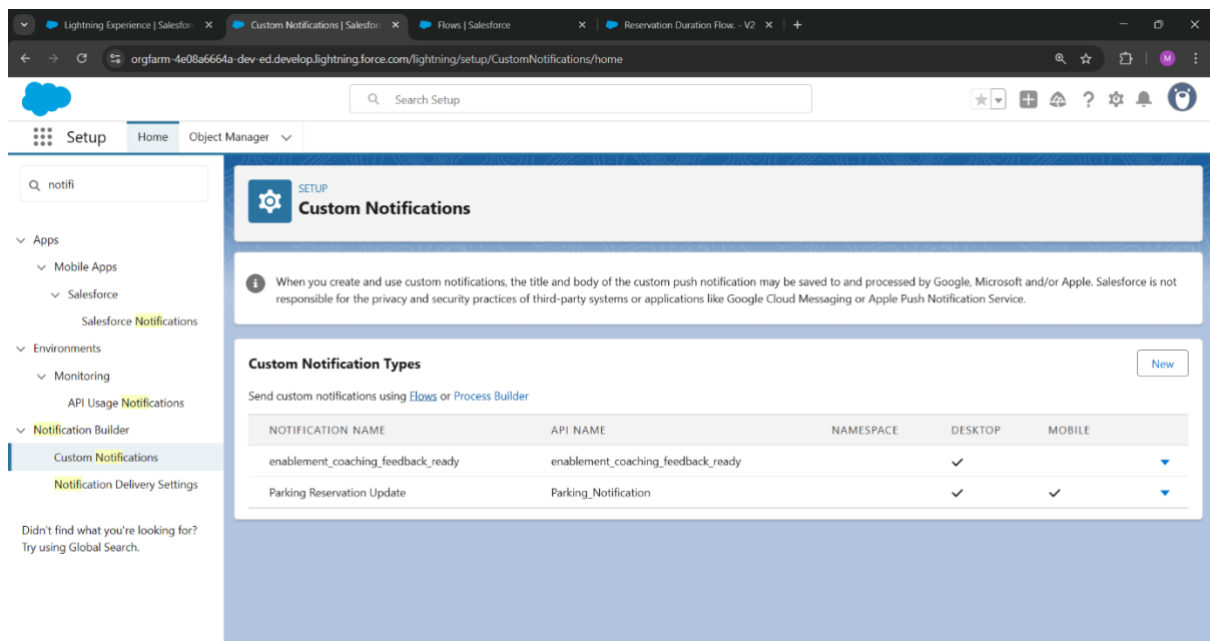
- Subject = *Validate Parking Entry*
 - Assigned To = Security Staff User
 - Related To = Reservation Id
4. Connected this element after the Approval step.
 5. Saved and Activated.

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.