

Phase 4: Process Automation in PetCare CRM

PetCare CRM

A Salesforce-Based Pet Shop Management System for Customer Engagement and Service Automation

1. Validation Rule

- Ensures booking dates are valid.
- Rule: **End Date must be after Start Date.**
- Prevents wrong or inconsistent data entry.

The screenshot displays the Salesforce Setup interface. The left sidebar shows the navigation menu with 'Setup' selected. The main content area is titled 'Service Booking' and shows the 'Validation Rule Detail' for the 'Service Booking Validation Rule'. The rule is active and has the following configuration:

Validation Rule Detail		Active	✓
Rule Name	EndDate_after_StartDate		
Error Condition Formula	AND(NOT(ISBLANK(Start_Date__c)), NOT(ISBLANK(End_Date__c)), End_Date__c < Start_Date__c)		
Error Message	End Date must be on or after Start Date.	Error Location	End Date
Description			
Created By	Mounika Savvana, 9/26/2025, 2:34 AM	Modified By	Mounika Savvana, 9/26/2025, 2:36 AM

2. Workflow Rules (Legacy)

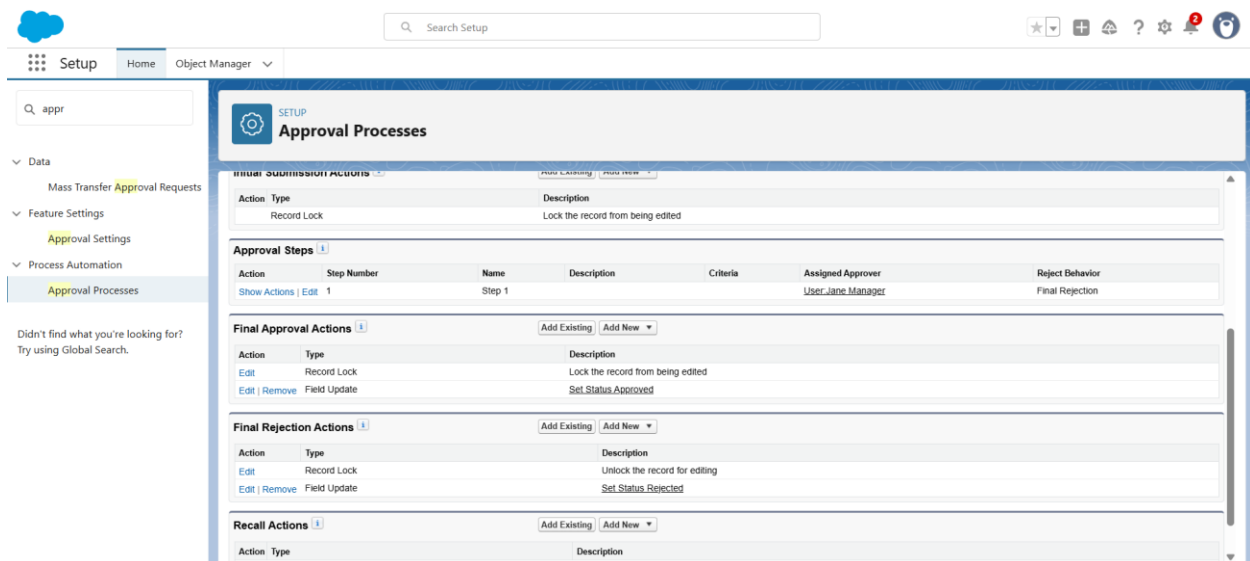
- Older Salesforce automation tool.
- Could send emails or update fields when conditions met.
- **Not recommended now** → replaced by Flow.

3. Process Builder (Legacy)

- Used for multi-step automation (update fields, create records).
- Example: Auto-change booking status when conditions match.
- **Replaced by Flow** → but important to know it existed.

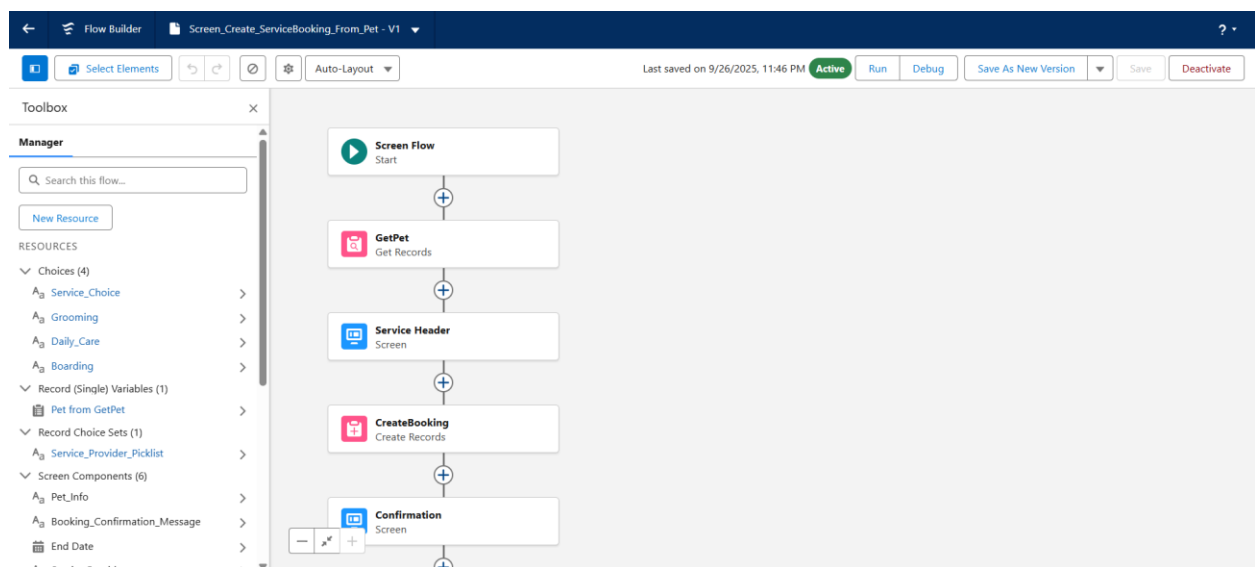
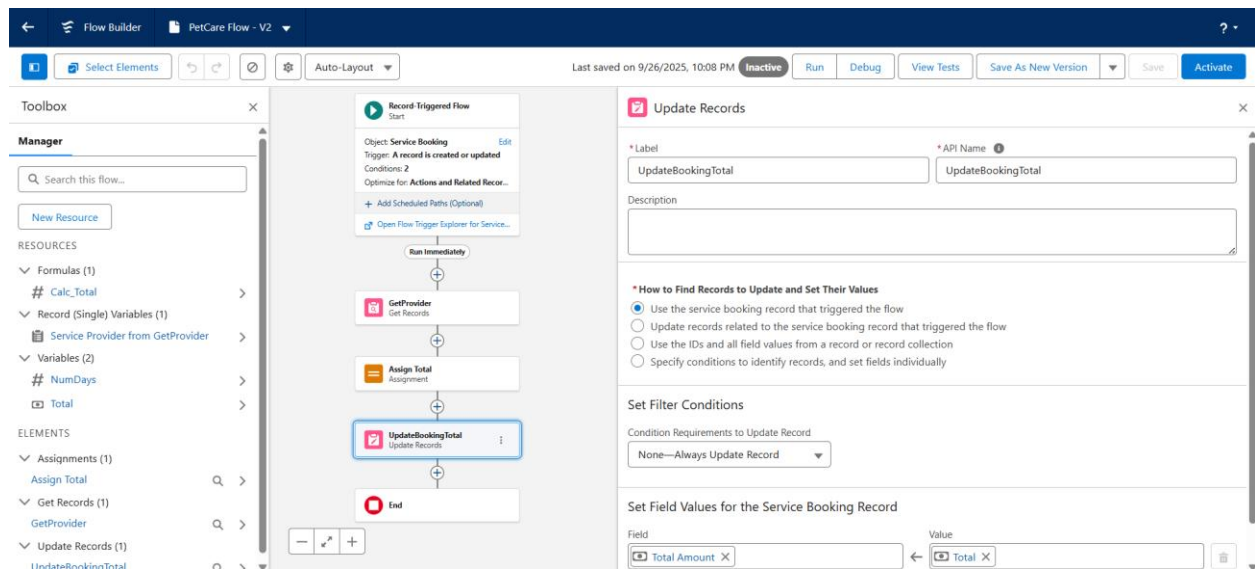
4. Approval Process

- Needed for **high-value bookings**.
- Condition: If booking > ₹50,000 → send for manager approval.
- On approval:
 - Status updates to **Confirmed**.
 - Email sent to Pet Owner.
 - Task created for staff.
 - Notification sent in-app.



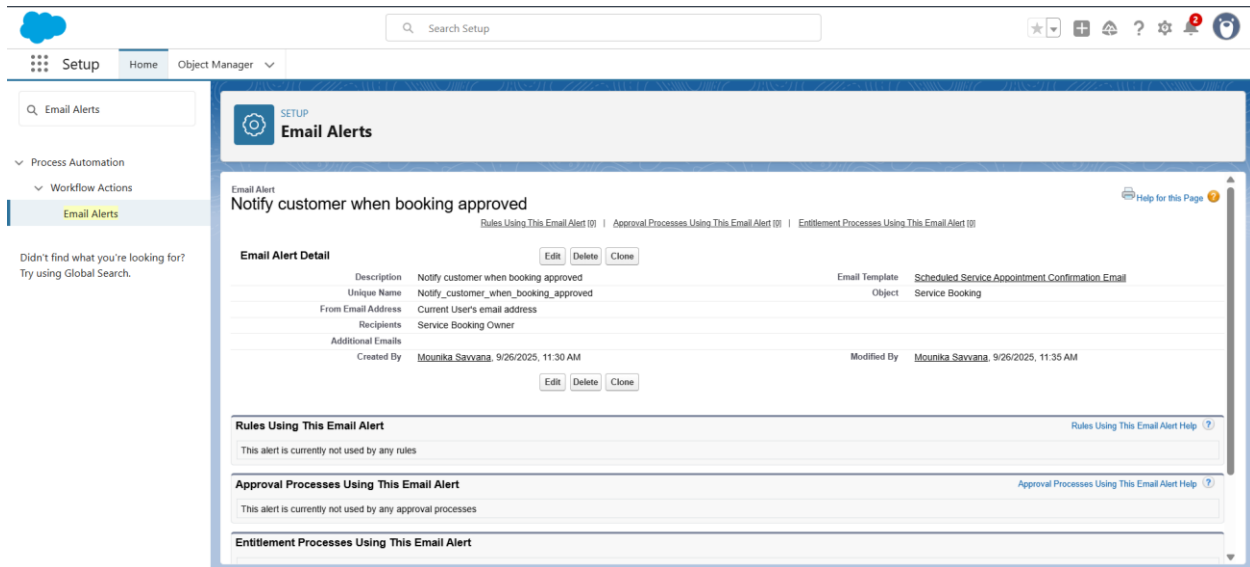
5. Flow Builder

- Modern and flexible automation tool.
- **Record-Triggered Flow**: Calculates Total Amount automatically.
- **Screen Flow**: Custom booking form → pre-fills pet & owner, asks service details.
- Replaces Workflow & Process Builder.



6. Email Alerts

- Auto email sent when booking is approved.
- Uses **Email Template** with booking & pet details.
- Keeps customer informed instantly.



7. Field Updates

- Automatically changes fields after actions.
- Example: Booking **Status** → **Confirmed** after approval.
- Reduces manual updates by staff.

8. Tasks

- Creates tasks for staff automatically.
- Example: Task “Prepare for Booking” after approval.
- Ensures follow-up work is not forgotten.

9. Custom Notifications

- Sends real-time notification inside Salesforce.
- Example: “Booking Confirmed for Pet Rocky.”
- Visible on desktop & mobile → faster than email.

10. Overall Benefits

- **Data accuracy** (validation rules).
- **Automation** (flows handle calculations & updates).
- **Control** (approval process for costly bookings).
- **Communication** (emails & notifications keep all informed).

- **Productivity** (tasks remind staff what to do).