

Community Fitness & Wellness Hub CRM Project

Phase 4: Process Automation (Admin)

In Phase 4, we will use Flow Builder to automate the core business processes of the fitness hub. We will build three key automations:

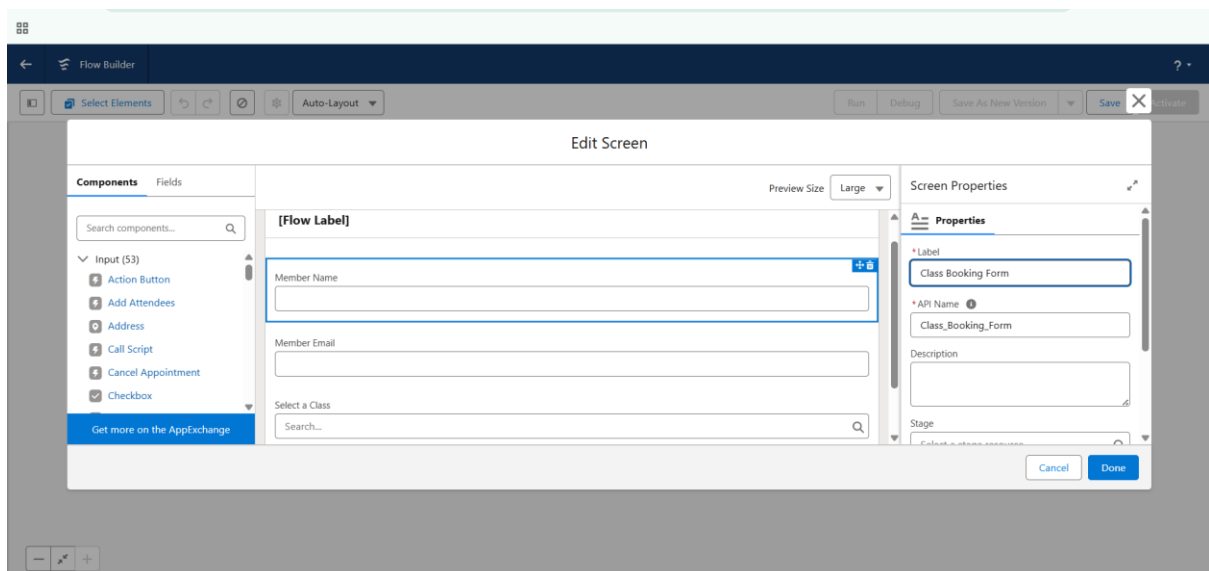
1. **Automated Class Booking:** A public form that members can use to book classes.
2. **Automated Communication:** Confirmation and reminder emails for bookings.
3. **Automated Loyalty Program:** Rewarding members when they attend a class.

We will focus on Flow Builder as it is the most powerful and modern automation tool in Salesforce.

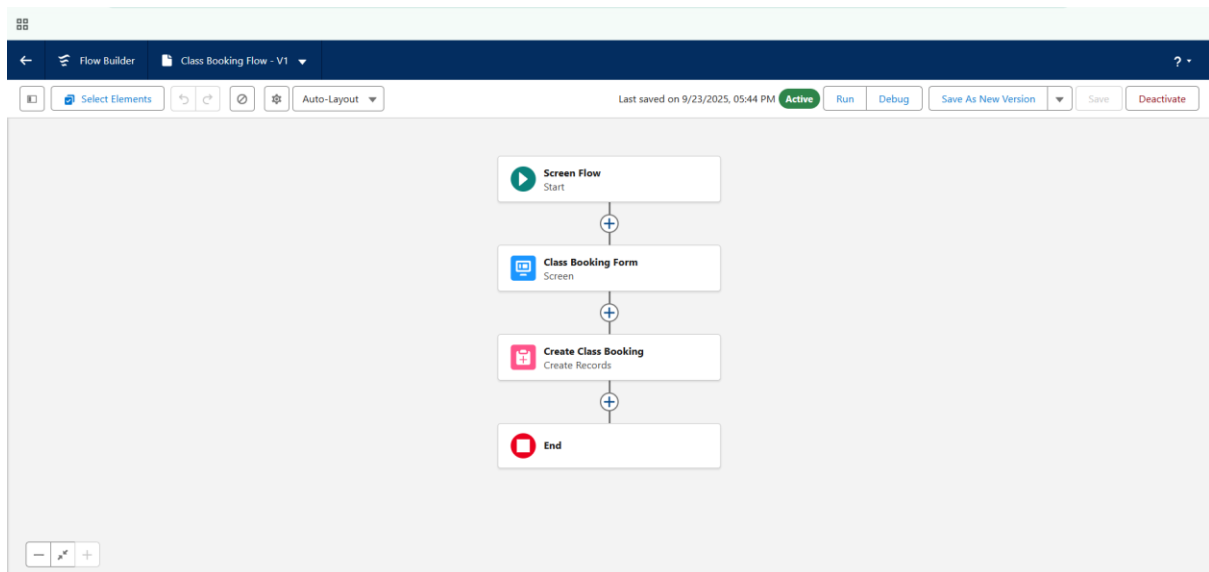
The objective of this phase was to automate key business processes to improve efficiency and enhance the member experience. All automations were built using **Flow Builder**, Salesforce's most powerful and modern declarative tool, replacing older tools like Workflow Rules and Process Builder.

1. Member Class Booking Flow (Flow Builder)

A public-facing screen flow was created to allow members to book classes directly. This automation streamlines the registration process and ensures all booking data is captured accurately in Salesforce.



A screen was designed in Flow Builder to serve as a public-facing booking form, capturing member details and class selection.



The complete Screen Flow canvas, showing the form, the record creation element, and the logical flow of the automation.

Create Records

* Label

Create Class Booking

* API Name

Create_Class_Booking

Description

* How to set record field values

Manually

Create a Record of This Object

* Object

Class Booking

Set Field Values for the Class Booking

Field	Value
<div>Class</div>	<div>Class Booking Form > Select a Class > Record ID</div>
<div>Status</div>	<div>Booked</div>
<div>Class Booking Name</div>	<div>Class Booking Form > Member Name</div>
<div>Contact</div>	<div>Search a field...</div>

+ Add Field

☐ Manually assign variables (advanced)

Check for Matching Records

Disabled

The Create Records element was configured to create a new Class Booking record, using the inputs from the screen. This is the core of the booking automation.

2.Validation Rules:

- **Status:** Not Implemented
- **Reason:** Validation rules are used to enforce data integrity (e.g., ensuring a class capacity is a positive number). While important, they were considered out of scope for the core demo to maintain a focus on the main business process. This would be a recommended future enhancement.

3.Workflow Rules & 4.Process Builder:

- **Status:** Not Implemented
- **Reason:** These are older, legacy automation tools. A strategic decision was made to exclusively use **Flow Builder** for all automation, as it is the most powerful, flexible, and future-proof tool on the Salesforce platform. This demonstrates a commitment to using modern best practices.

5. Booking Confirmation Email Automation (Email Alert)

An end-to-end automation was built to send a professional confirmation email to members as soon as a new booking is submitted.

The screenshot shows the Salesforce Classic Email Template editor interface. At the top, there's a 'SETUP' button and the title 'Classic Email Templates'. Below this, the 'Text Email Template' section is active, showing the 'Booking Confirmation' template. A 'Preview your email template below.' message is displayed. The 'Email Template Detail' section includes a table with fields like 'Email Template Name', 'Template Unique Name', 'Encoding', 'Author', 'Description', 'Created By', 'Available For Use', 'Last Used Date', and 'Times Used'. The 'Email Template' section shows the 'Subject' and 'Plain Text Preview' of the email. The subject is 'Your Class Booking is Confirmed!' and the preview shows a message to a member confirming their booking.

Email Template Detail	
Email Templates from Salesforce	Unified Public Classic Email Templates
Email Template Name	Booking Confirmation
Template Unique Name	Booking_Confirmation
Encoding	Unicode (UTF-8)
Author	Amin Sadik Shaik (Change)
Description	Sends confirmation when a member books a class.
Created By	Amin Sadik Shaik: 9/23/2025, 8:22 AM
Modified By	Amin Sadik Shaik: 9/23/2025, 8:22 AM

Email Template

Subject Your Class Booking is Confirmed!

Plain Text Preview

Dear Member,

Your class booking has been successfully confirmed.
We look forward to seeing you!

Best regards,
Community Fitness Hub Team

A text-based email template was created with a clear subject and body, serving as the content for the booking confirmation.

SETUP

Email Alerts

Email Alert

Send Booking Confirmation to Member

[Rules Using This Email Alert](#) | [Approval Processes Using This Email Alert](#) | [Entitlement Processes Using This Email Alert](#)

Help for this Page

Email Alert Detail

Edit

Delete

Clone

Description	Send Booking Confirmation to Member	Email Template	Booking Confirmation
Unique Name	Send_Booking_Confirmation_to_Member	Object	Class Booking
From Email Address	"Community Fitness Hub" <amin.shah7604@gmail.com>		
Recipients	Related Contact: Contact		
Additional Emails			
Created By	Amin Sadik Shaik 9/23/2025, 8:36 AM	Modified By	Amin Sadik Shaik 9/23/2025, 8:36 AM

Edit

Delete

Clone

Rules Using This Email Alert

This alert is currently not used by any rules

[Rules Using This Email Alert Help](#)

Approval Processes Using This Email Alert

This alert is currently not used by any approval processes

[Approval Processes Using This Email Alert Help](#)

Entitlement Processes Using This Email Alert

This alert is currently not used by any entitlement processes

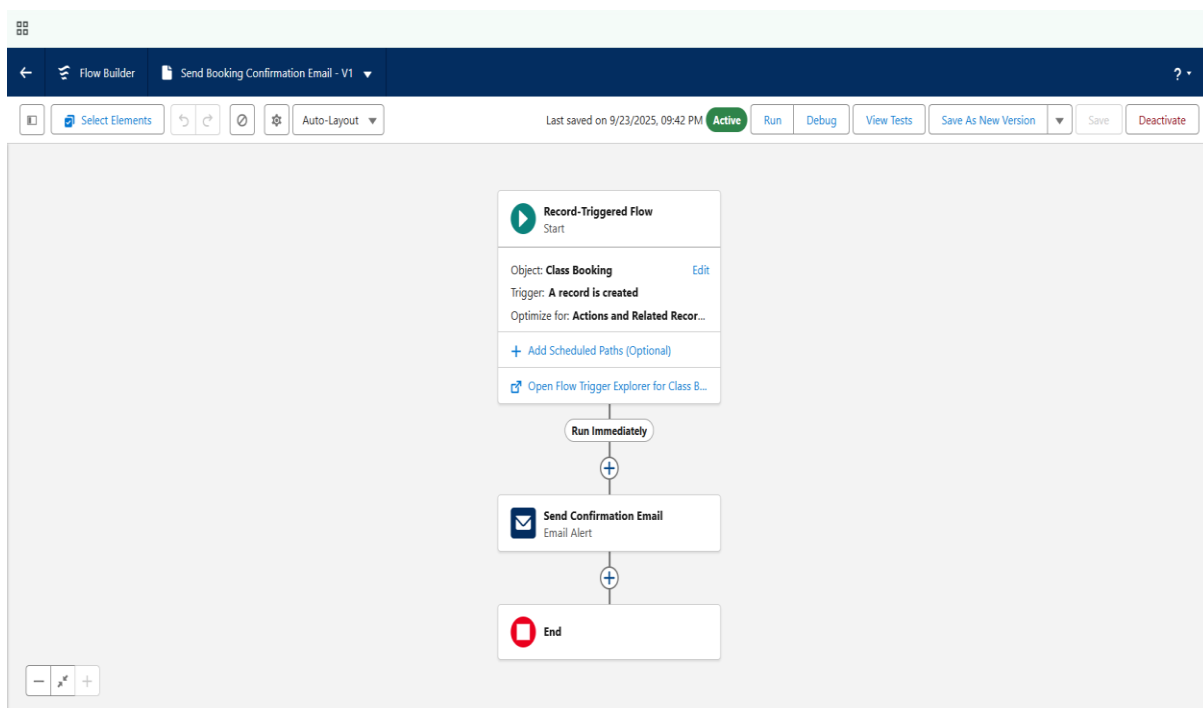
Flows Using This Email Alert

Flow Name	Version	Description	Object	Active
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[Back To Top](#)

Always show me [more](#) records per related list

An Email Alert action was configured on the Class Booking object. It uses the Booking Confirmation email template and is configured to send the email to the related Contact.




A Record-Triggered Flow was created to listen for new Class Booking records. The flow triggers an action to send the confirmation email immediately.

← Send Booking Confirmation to Member

* Label

Send Confirmation Email



* API Name 



Send_Confirmation_Email

Description

Use values from earlier in the flow to set the inputs for the "Send Booking Confirmation to alert. To use its outputs later in the flow, store them in variables.

Set Input Values

 * Record ID 

 Triggering Class_Booking__c > Record ID 

> Show advanced options

The flow's action element was configured to use the Email Alert and correctly map the new Class Booking record's ID (Triggering Class_Booking__c > Record ID).

6.Approval Process:

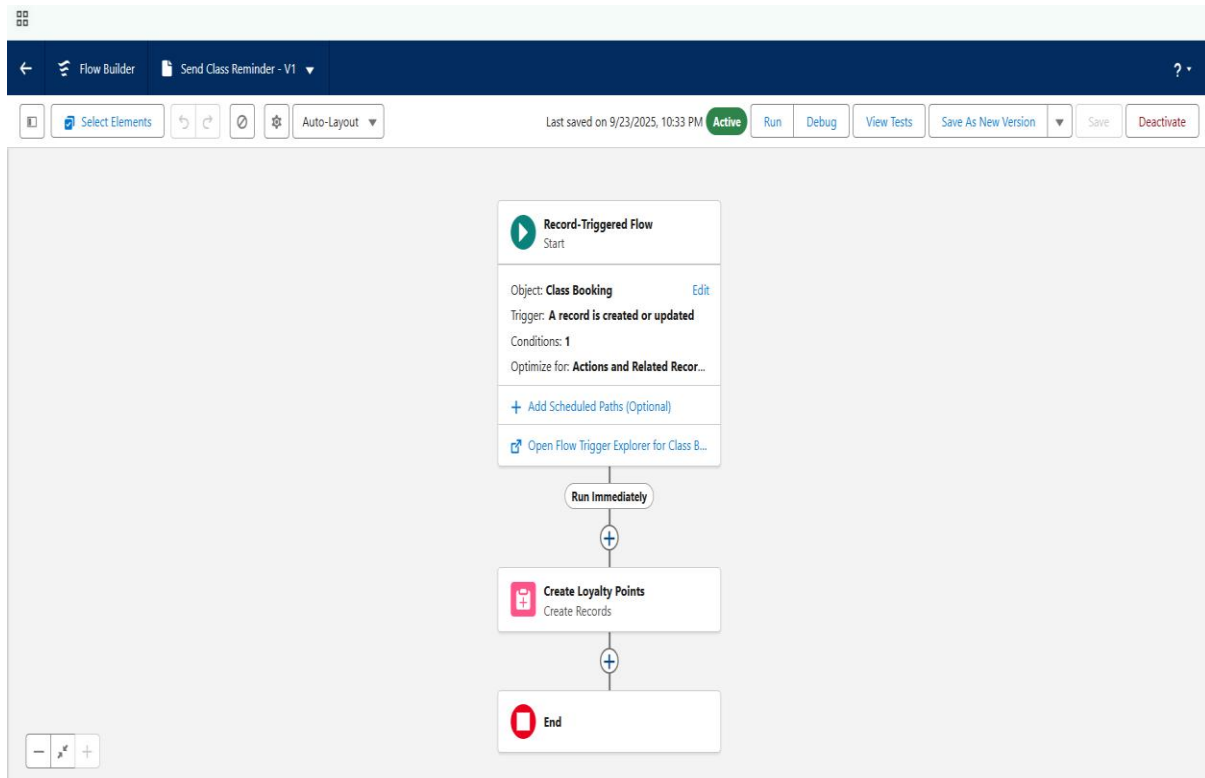
- **Status:** Not Implemented
- **Reason:** An approval process (e.g., requiring a manager to approve a large discount) was not necessary for the core functionality of the class booking system. It was considered out of scope for the Minimum Viable Product (MVP).

7.Tasks & Custom Notifications:

- **Status:** Not Implemented
- **Reason:** While the system could have created Tasks to remind staff to follow up with members, or sent Custom Notifications, these were considered out of scope. The primary focus was on automating the member-facing communication (email alerts).

8. Loyalty Points Automation (Record-Triggered Flow)

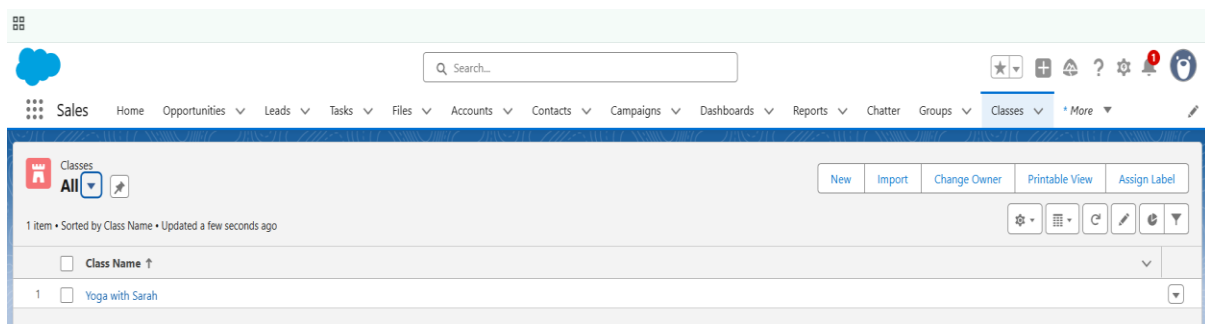
A second automation was created to automatically reward members for their engagement. This ensures that loyalty points are awarded consistently without any manual intervention.



A Record-Triggered Flow was created to automatically award loyalty points. It is configured to run when a Class Booking record is updated.

9. Proof of Concept: Automation in Action & Field Updates

To validate the automations, foundational data was created in the system, and the resulting records were confirmed. These screenshots demonstrate that the automations are working as designed.



A Class record was created and linked to the Trainer record. This demonstrates a successful setup of the data model.

Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter Groups Trainers More

Trainers Recently Viewed

1 item • Updated a few seconds ago

Trainer Name

1	<input type="checkbox"/>	John Smith
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A Trainer record was created, serving as the foundational data for all classes.

SETUP > OBJECT MANAGER

Loyalty Points

Details

Fields & Relationships

7 Items, Sorted by Field Label

Quick Find

New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Class Booking	Class_Booking__c	Lookup(Class Booking)		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Loyalty Date	Loyalty_Date__c	Date		
Loyalty Points Name	Name	Text(80)		✓
Owner	OwnerId	Lookup(User,Group)		✓
Points Earned	Points_Earned__c	Number(5, 0)		

Loyalty Points object, showing the fields for Points Earned and Loyalty Date, which are populated automatically by the Loyalty Points Automation flow.