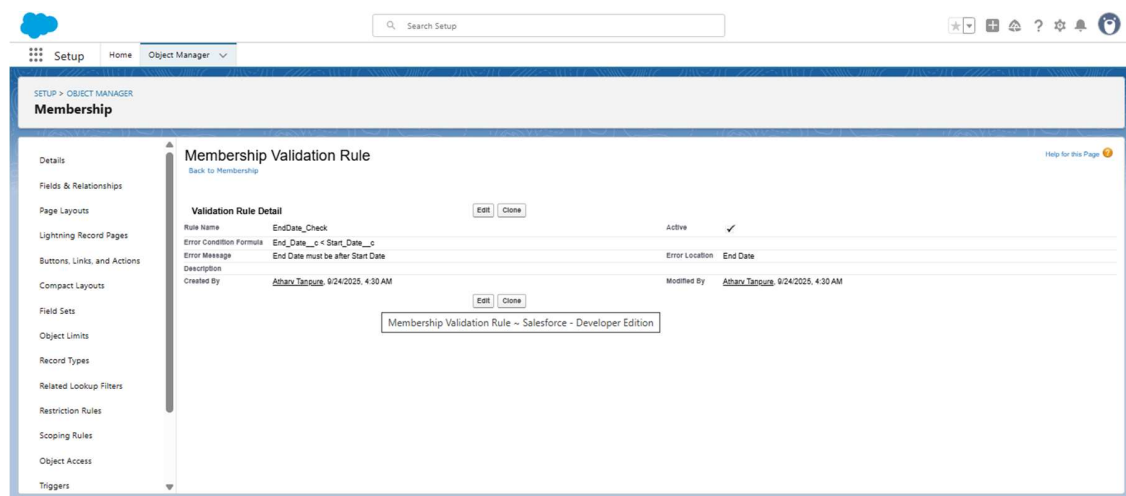


FitCRM — Phase 4: Process Automation

Step 1 — Validation Rules

Validation Rules ensure correct data entry and enforce business logic.

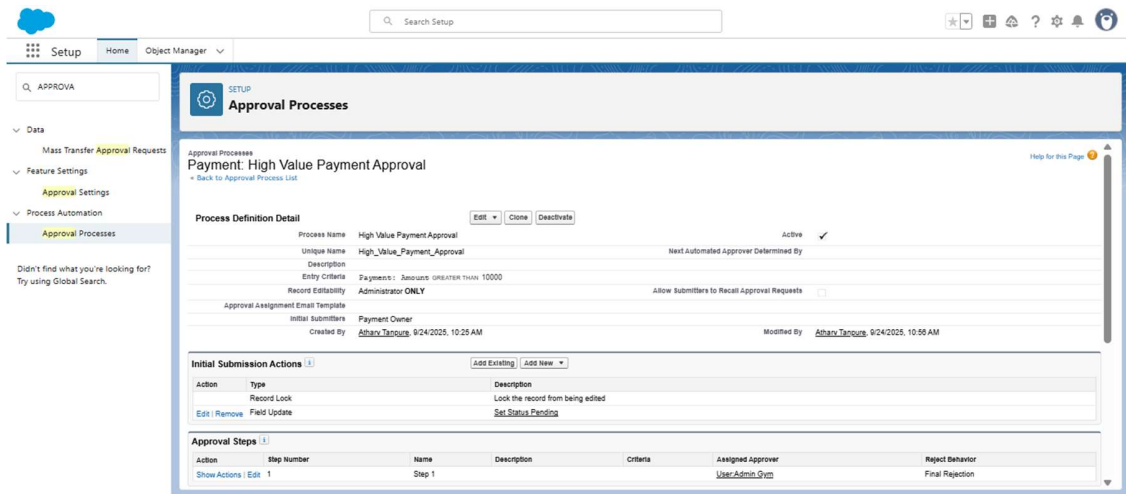
- Membership__c EndDate__c cannot be earlier than StartDate__c.
- Payment__c Amount__c must be greater than 0.
- Attendance__c CheckIn__c is required.



Step 2 — Approval Process

Approval Process ensures authorization before records proceed.

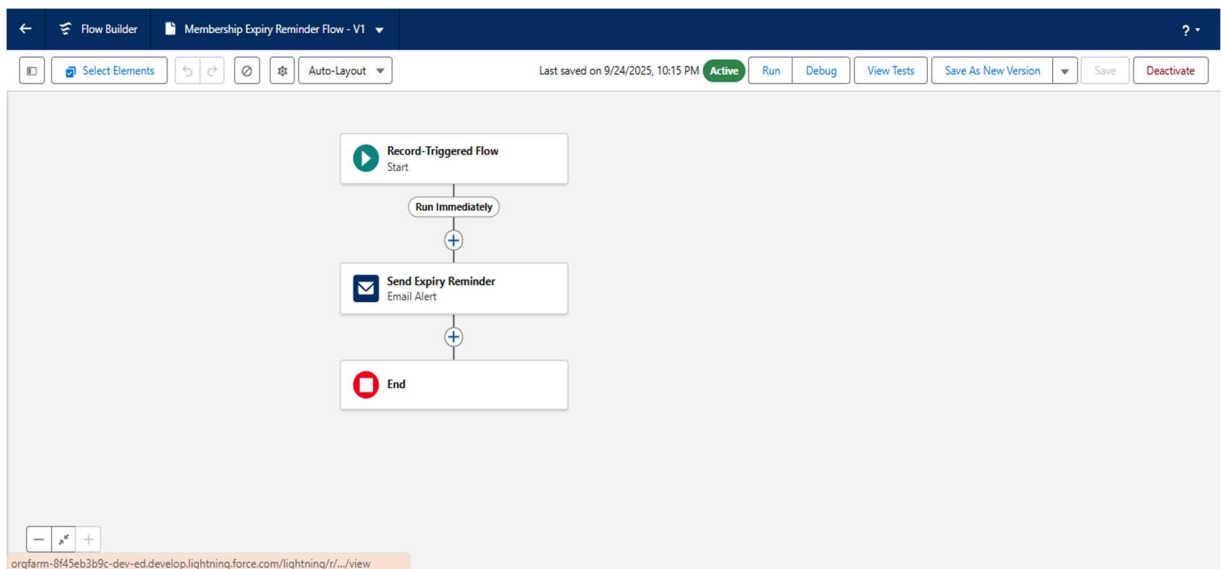
- Payment__c above ₹10,000 requires Admin approval.
- Discounted Membership__c requires Manager approval.



Step 3 — Flow Builder

Flow Builder supports record-triggered, scheduled, and screen flows.

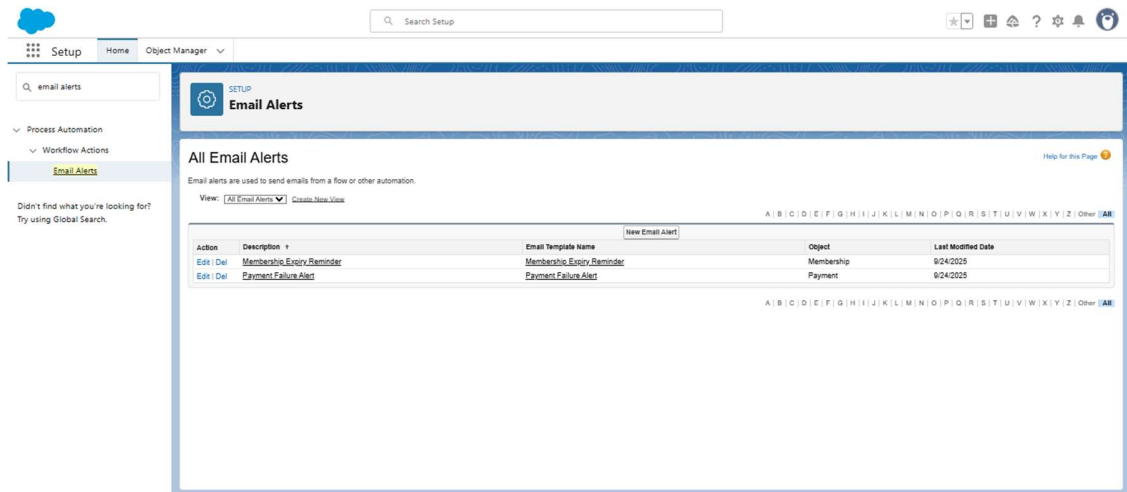
- Reminder email 3 days before Membership_c EndDate_c.
- Notify Reception Staff when Payment_c fails.
- Screen Flow to create Member_c, Membership_c, and Payment_c together.



Step 4 — Email Alerts

Send automated email communications.

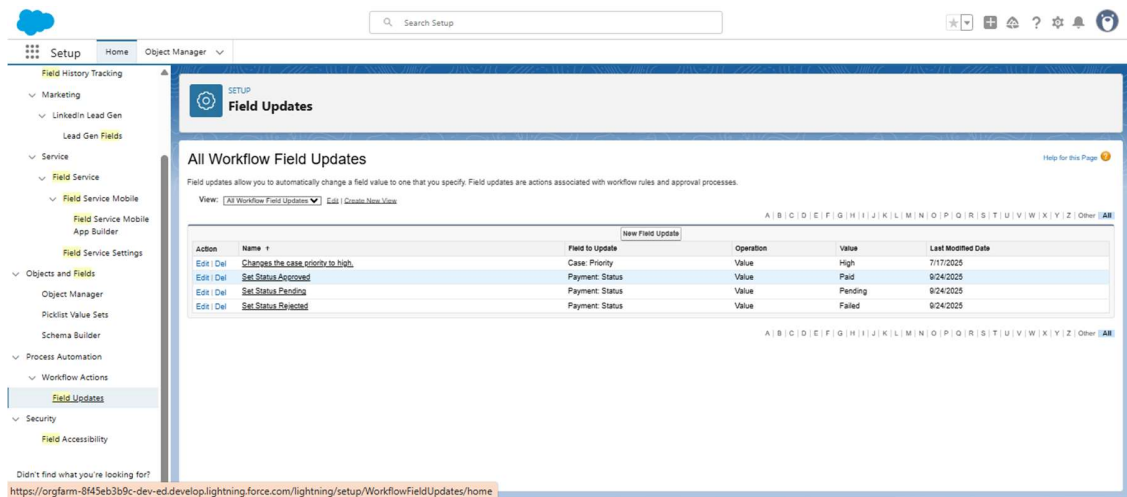
- Expiry reminder email to Member.
- Payment failure alert to Reception Staff.



Step 5 — Field Updates

Update fields automatically when criteria are met.

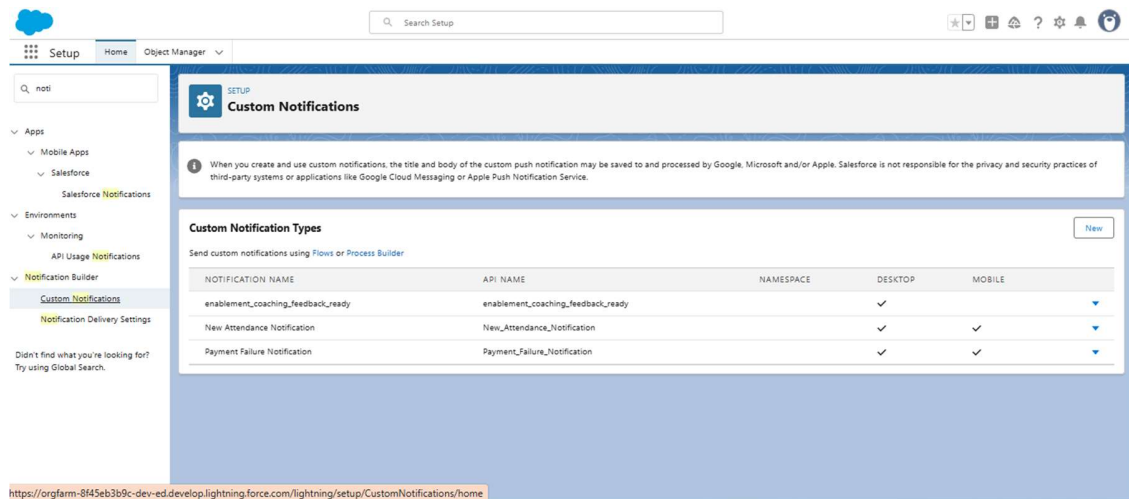
- Changes the case priority to High
- Set Status approved
- Set Status Pending
- Set Status Rejected



Step 6 — Custom Notifications

Deliver in-app alerts to users in real-time.

- Notify Trainer when Attendance__c is created.
- Notify Reception when Payment__c fails.



The screenshot shows the Salesforce Setup interface for Custom Notifications. The left sidebar contains a navigation menu with the following items: Setup, Home, Object Manager, Apps, Mobile Apps, Salesforce, Salesforce Notifications, Environments, Monitoring, API Usage Notifications, Notification Builder, Custom Notifications (highlighted), and Notification Delivery Settings. The main content area is titled 'Custom Notifications' and includes a warning message about privacy and security practices. Below this is a table titled 'Custom Notification Types' with columns for Notification Name, API Name, Namespace, Desktop, and Mobile. The table lists three notification types: 'enablement_coaching_feedback_ready', 'New Attendance Notification', and 'Payment Failure Notification'. A 'New' button is located in the top right corner of the table area.

Search Setup

Setup

Custom Notifications

When you create and use custom notifications, the title and body of the custom push notification may be saved to and processed by Google, Microsoft and/or Apple. Salesforce is not responsible for the privacy and security practices of third-party systems or applications like Google Cloud Messaging or Apple Push Notification Service.

Custom Notification Types

Send custom notifications using Flows or Process Builder

NOTIFICATION NAME	API NAME	NAMESPACE	DESKTOP	MOBILE
enablement_coaching_feedback_ready	enablement_coaching_feedback_ready		✓	▼
New Attendance Notification	New_Attendance_Notification		✓	✓
Payment Failure Notification	Payment_Failure_Notification		✓	✓

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<https://orgfarm-8f45eb3b9c-dev-ed.develop.lightning.force.com/lightning/setup/CustomNotifications/home>