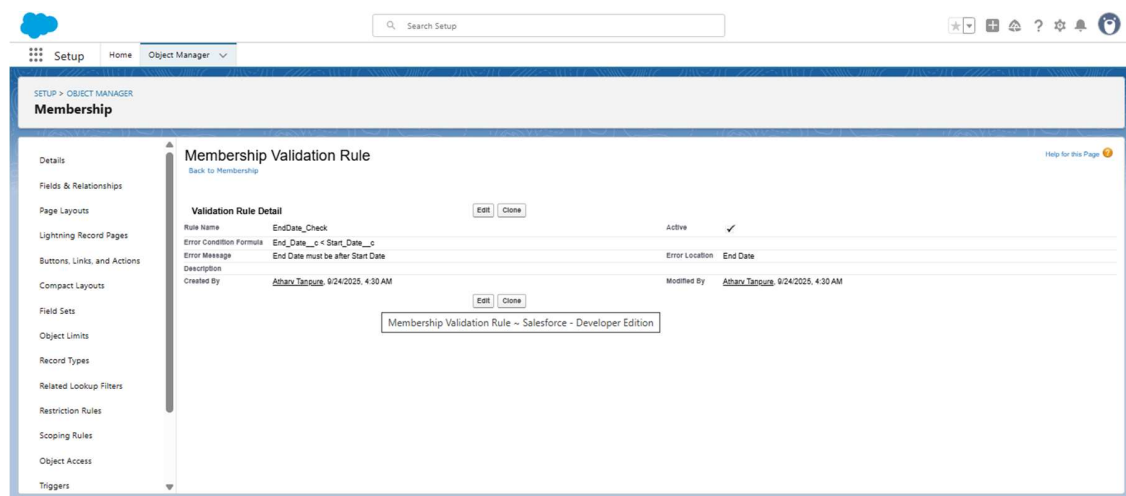# FitCRM — Phase 4: Process Automation

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.
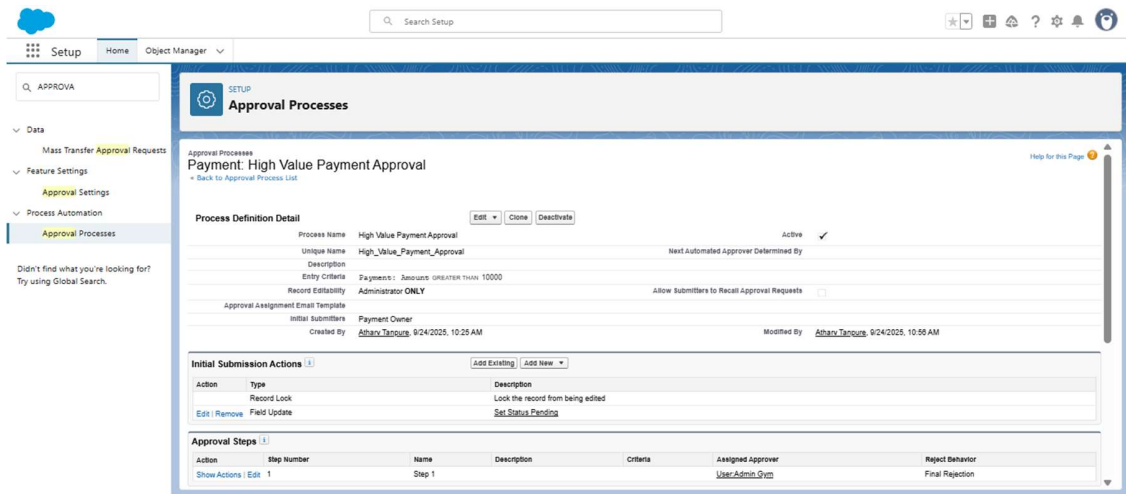
Step 3 — Flow Builder

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.
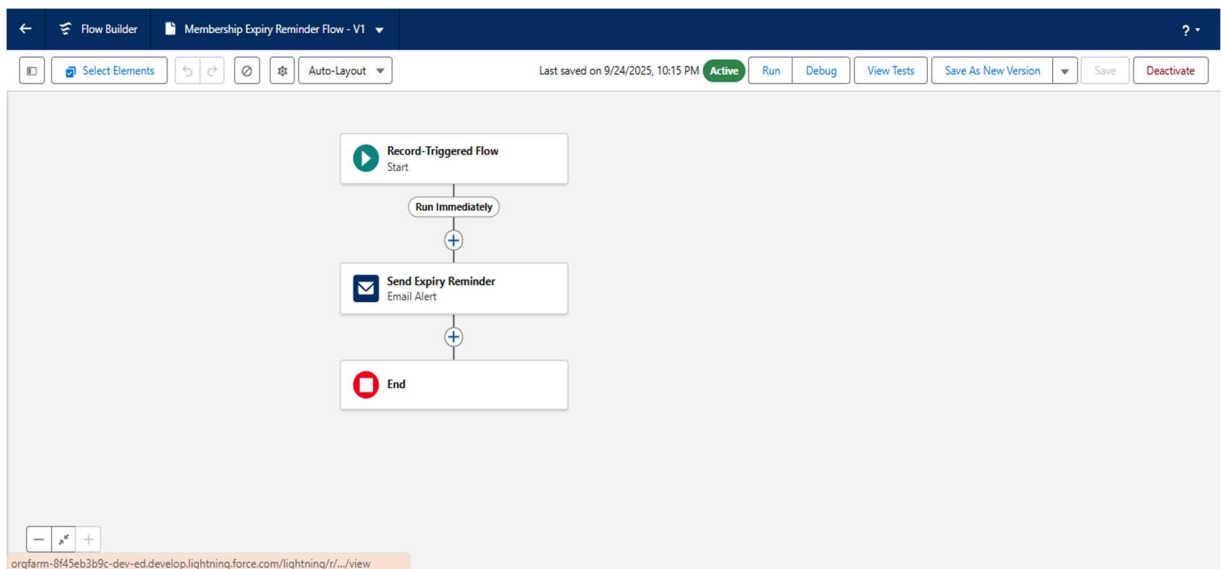
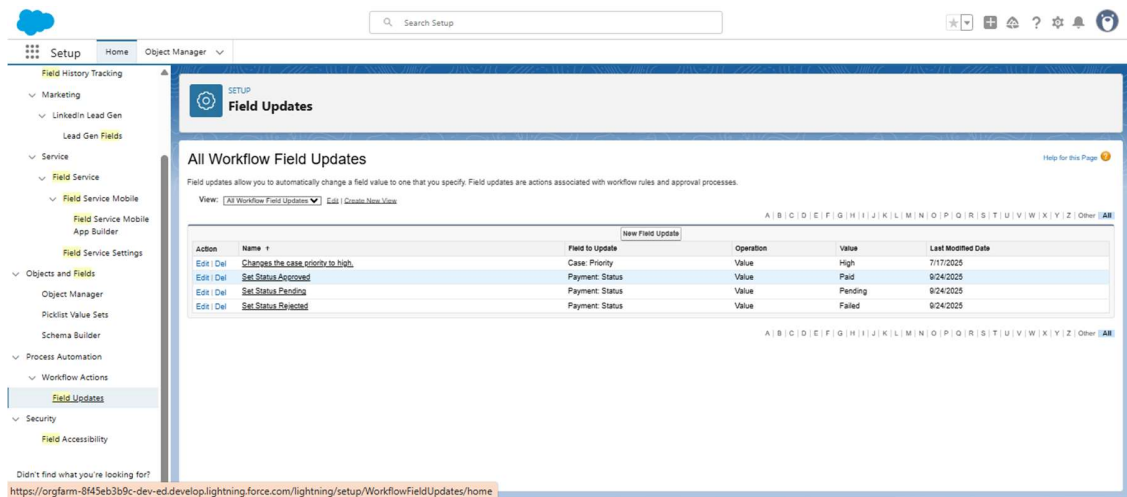## Step 4 — Email Alerts

Send automated email communications.

• Expiry reminder email to Member.

• Payment failure alert to Reception Staff.
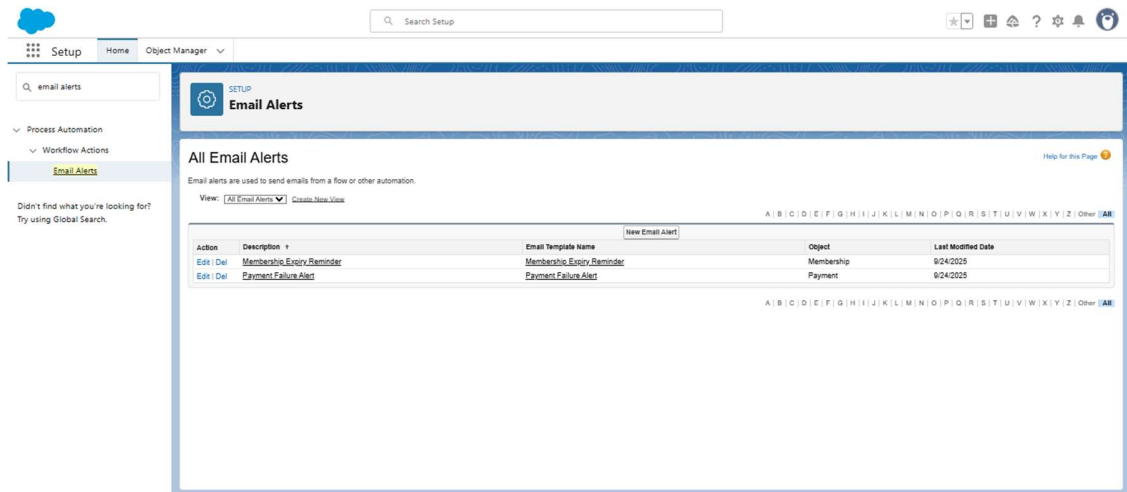
Step 5 — Field Updates

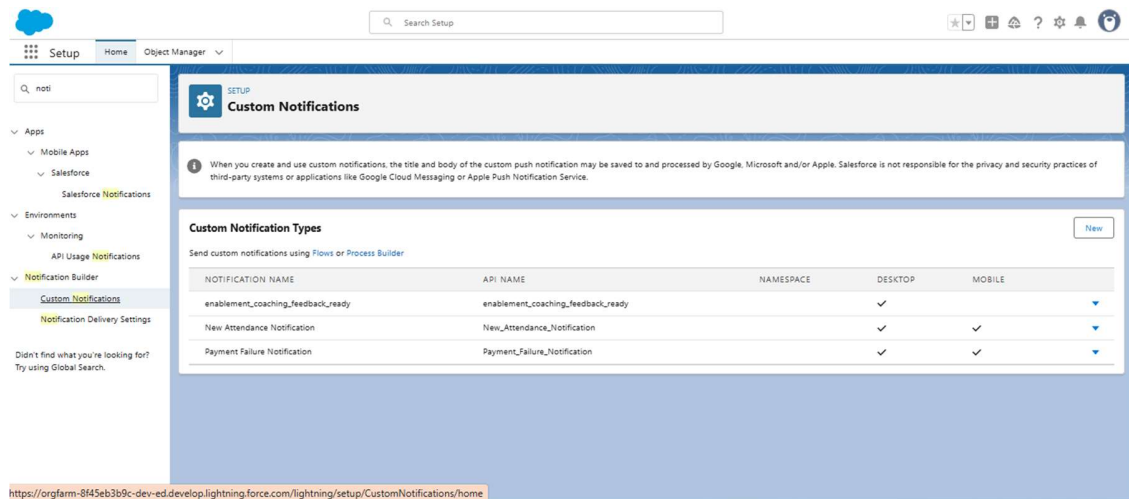Update fields automatically when criteria are met.

- 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.