



Phase 4 - Process Automation Report

This document summarizes the specific steps taken to complete the automation tasks for Phase 4 of the Salon Management System project.

Validation Rules Implementation

Rule Created: Appointment_Date_Is_Valid on the Appointment object.

Navigation: Created via Setup > Object Manager > Appointment > Validation Rules.

Action: A formula using OR() and MOD() functions was configured to check the Appointment_Date_Time__c field. This prevents users from saving appointments in the past or on weekends and displays an error message.





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Appointment Validation Rule

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Validation Rule Detail

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Rule Name	Appointment_Date_Is_Valid	Active	<input checked="" type="checkbox"/>
Error Condition Formula	OR(DATEVALUE(Appointment_Date_Time__c) < TODAY() , /* Condition 2: Check if the date is a Saturday (Weekday 7) */ MOD(DATEVALUE(Appointment_Date_Time__c) - DATE(1900, 1, 7), 7) = 0, /* Condition 3: Check if the date is a Sunday (Weekday 1) */ MOD(DATEVALUE(Appointment_Date_Time__c) - DATE(1900, 1, 7), 7) = 1)		
Error Message	The appointment date is invalid. Please ensure the date is in the future and not on a weekend.	Error Location	Top of Page
Description			
Created By	Ayush Kumar Dewan, 17/09/2025, 6:58 am	Modified By	Ayush Kumar Dewan, 21/09/2025, 1:35 am

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Legacy Automation Tools Decision

Workflow Rules

These legacy automation tools were intentionally not used.
All automation was built using the more powerful and efficient Flow Builder as a modern best practice.

Process Builder

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All automation was built using the more powerful and efficient Flow Builder as a modern best practice.

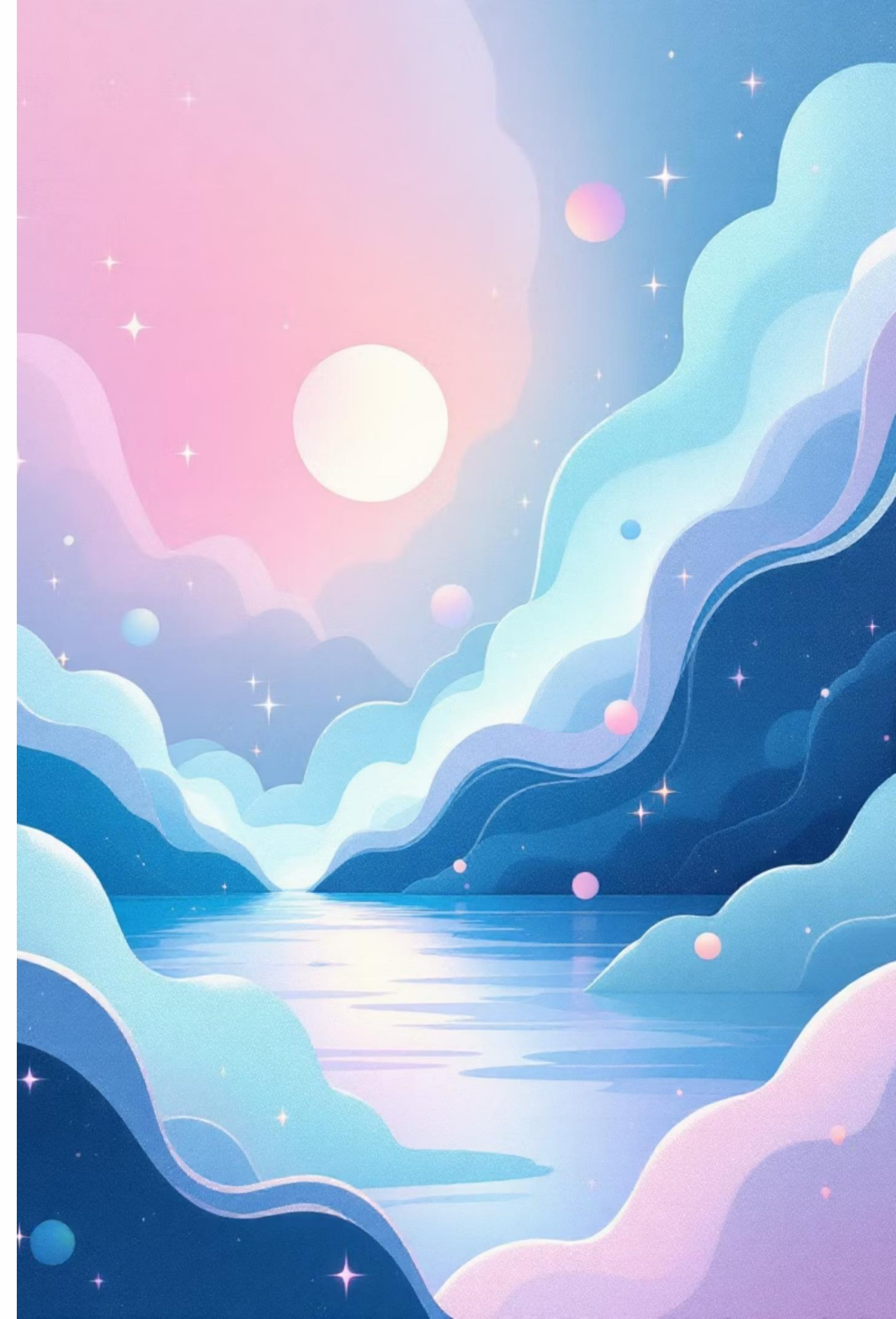
Approval Process Configuration

Process Created: Discount Approval on the Appointment object using the Jump Start Wizard.

Prerequisite Built: A Discount (Percent) field was first added to the Appointment object.

Configuration: The entry criteria were set to trigger the process if an Appointment's Discount is greater than 20% (0.20). The approver was set to be automatically assigned to the user's Manager based on the Role Hierarchy.

Deployment: The process was Activated, and the "Submit for Approval" button and "Approval History" related list were automatically added to the Appointment page layout.





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SETUP

Approval Processes

Approval Processes

Appointment: Discount Approval

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Process Definition Detail

Edit Clone Deactivate

Process Name	Discount Approval	Active	<input checked="" type="checkbox"/>
Unique Name	Discount_Approval	Next Automated Approver Determined By	
Description			
Entry Criteria	Appointment: Discount GREATER THAN 0.20		
Record Editability	Administrator ONLY	Allow Submitters to Recall Approval Requests	<input type="checkbox"/>
Approval Assignment Email Template			
Initial Submitters	Appointment Owner		
Created By	Ayush Kumar Dewan, 17/09/2025, 7:13 am		Modified By Ayush Kumar Dewan, 17/09/2025, 7:13 am

Initial Submission Actions

Add Existing Add New

Action	Type	Description
	Record Lock	Lock the record from being edited

Approval Steps

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
Show Actions Edit	1	Step 1			User: Satpreet Dewan	Final Rejection

Final Approval Actions

Add Existing Add New

Action	Type	Description
Edit	Record Lock	Lock the record from being edited

Flow Builder Overview

Two distinct flows were built to automate key business processes.

Screen Flow

Booking Wizard - Interactive appointment creation process

Scheduled-Triggered Flow

Daily Appointment Reminders - Automated reminder system

Screen Flow: Booking Wizard

01

Screen 1 ("Client Information")

Built with a Lookup component configured with the Field API Name Client__c to find existing Contact records.

02

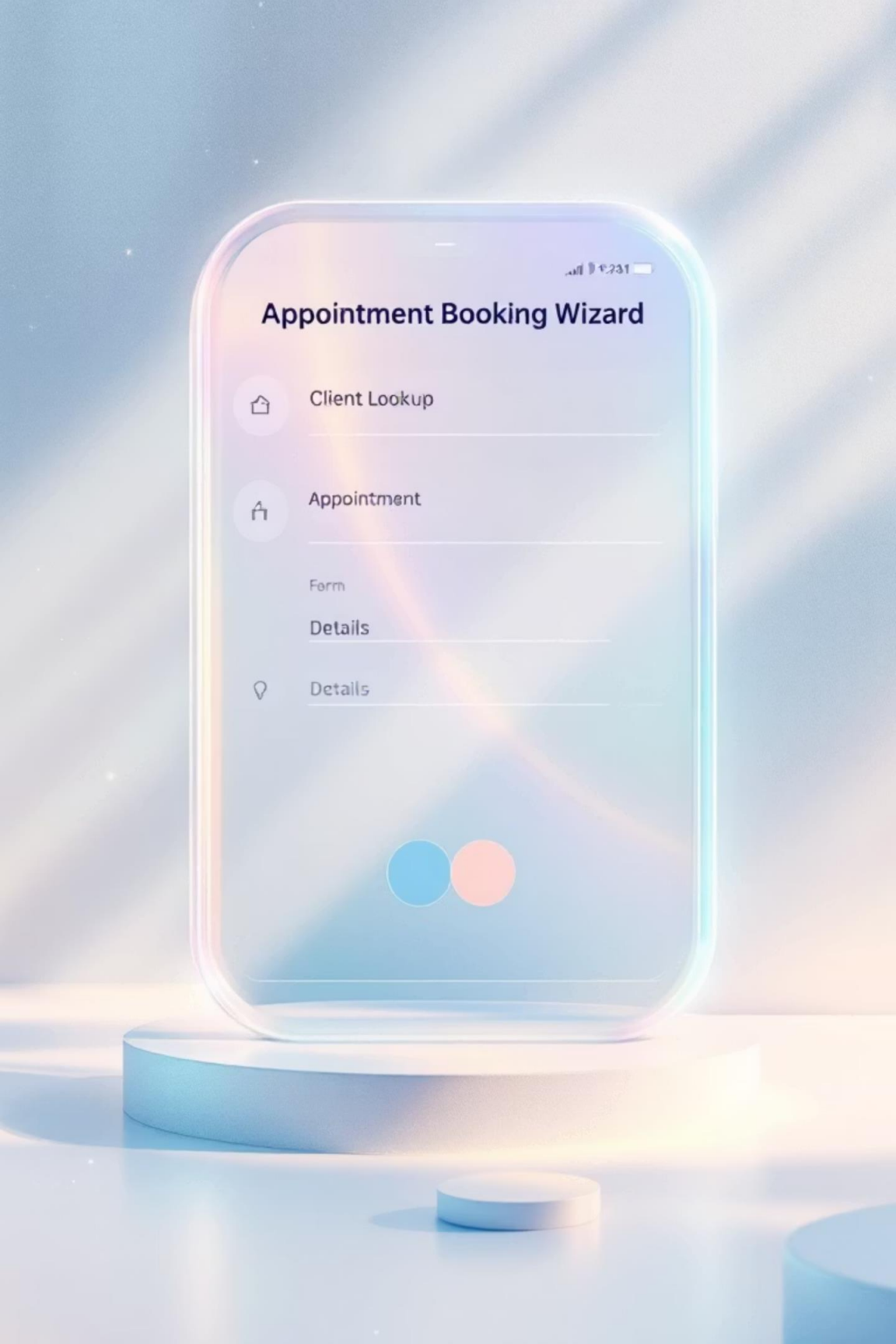
Screen 2 ("Appointment Details")

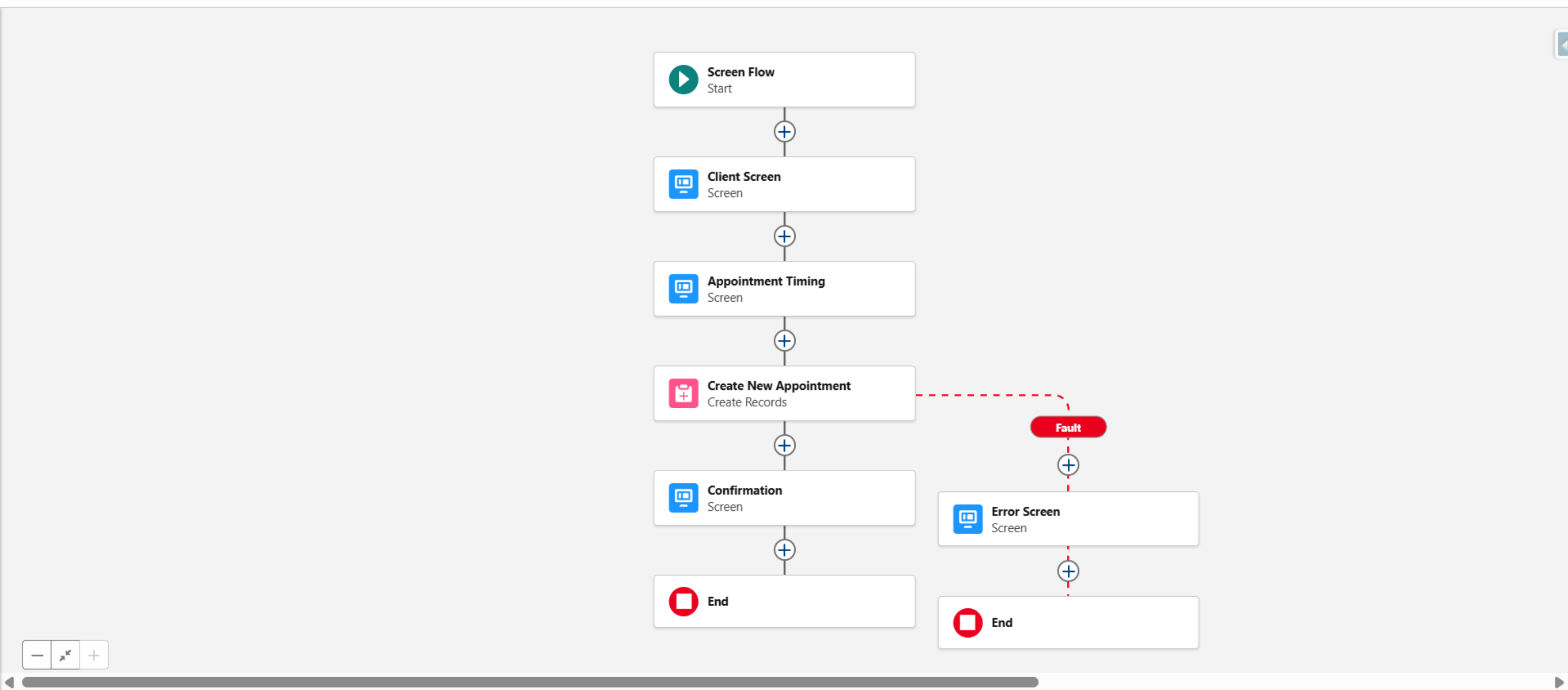
Built with Lookup components for Service__c and Stylist__c (User), and a Date Time component. Each component was made Required.

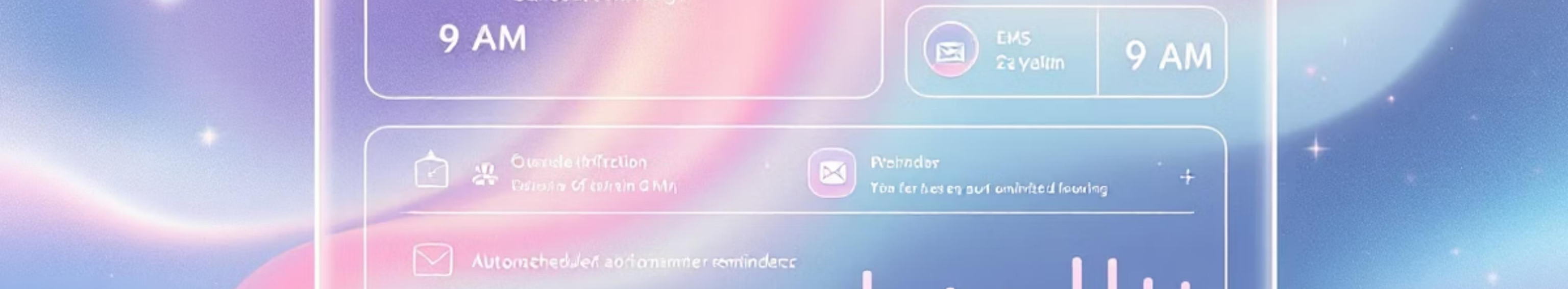
03

Create Record Step

A Create Records element was configured to create a single Appointment record, with field values mapped from the screen components (e.g., Client__c was set from {!LookupClient.recordId}).





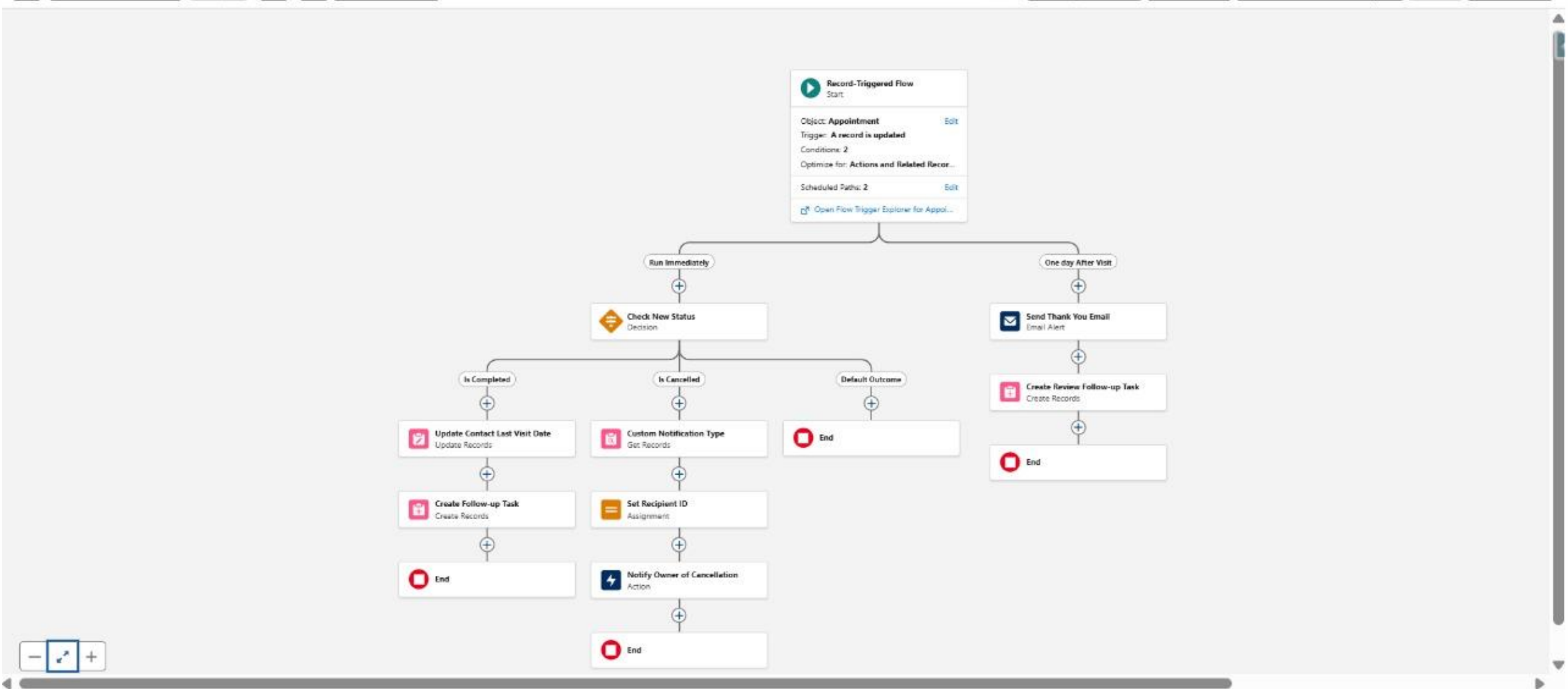


Scheduled-Triggered Flow: Daily Appointment Reminders

Configuration: The flow was scheduled to run every morning at 9:00 AM. It was configured to get all Appointment records where the Status is "Scheduled". A Decision element was added to check if the appointment date is equal to a formula resource for TODAY() + 1.

Actions: For each matching appointment, the flow was configured to perform two actions:

1. Send the Appointment Confirmation Email Alert.
2. Create a completed Task with the subject "SMS Reminder Sent" on the client's record as a "mock" SMS log.



Email Alerts Configuration

Alert Created: Send Appointment Confirmation Email.

Action: The alert was configured to use the Appointment Confirmation email template and send it to the Related Contact: Client. It is called by the Daily Appointment Reminders flow.



Field Updates and Tasks Summary

Field Updates

Action Taken: No separate field update actions were created, as the flow intended for this functionality (Appointment - Status Change Trigger) was removed from the scope of this phase.

Tasks

Action Taken: The Daily Appointment Reminders flow was configured to create a new completed Task with the subject "SMS Reminder Sent" to serve as an auditable log.