

## Phase 4: Process Automation (Admin) – TourEase Project

### 1. Validation Rules

- **Purpose:** Enforce data integrity by preventing incorrect or incomplete data entry.
- **Example:** Ensure that Booking\_Date\_\_c is not in the past.

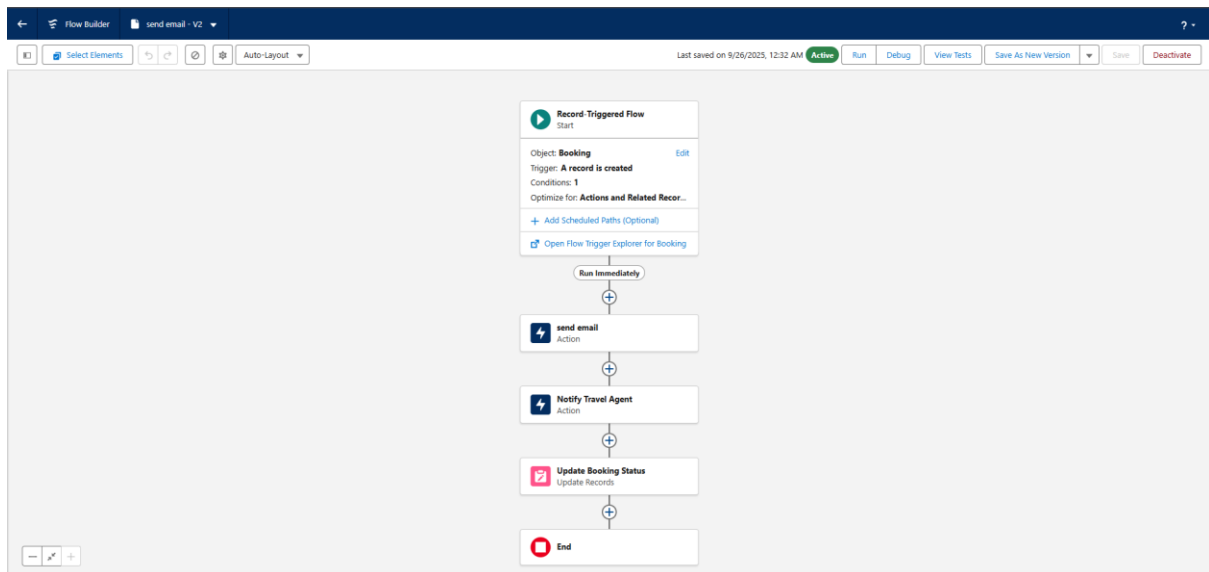
Booking\_Date\_\_c < TODAY()

The screenshot shows the Salesforce Setup interface. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, and Restriction Rules. The main content area is titled 'Validation Rules' and shows a table with 2 items, sorted by Rule Name. The table has columns for Rule Name, Error Location, Error Message, Active status, and Modified By. The rules listed are 'BookingDate\_FutureOnly' and 'Status\_Required'.

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
BookingDate_FutureOnly	Booking Date	Booking date must be today or in the future.	✓	Chidwila Tedla, 9/25/2025, 9:55 AM
Status_Required	Status	Please select a Status for the booking.	✓	Chidwila Tedla, 9/26/2025, 9:20 AM

### 2. Process Builder

- **Purpose:** Automate more complex logic than workflow rules, including record creation and updates.
- **Example:** If a booking is canceled, automatically update the package availability and notify the admin.



### 3. Approval Process

- **Purpose:** Route records for manager approval.
- **Example:** High-value bookings require manager approval before confirmation.

The screenshot shows the Salesforce Setup interface for Approval Processes. The left sidebar contains navigation links for Setup, Home, Object Manager, and a search bar. The main content area is titled 'Approval Processes' and shows the configuration for 'Booking: VIP Booking Approval'. The configuration includes fields for Process Name, Unique Name, Description, Entry Criteria, Record Eligibility, Approval Assignment Email Template, Initial Submitters, Created By, and Modified By. Below these fields are sections for Initial Submission Actions, Approval Steps, Final Approval Actions, and Final Rejection Actions, each with a table of actions and their descriptions.

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

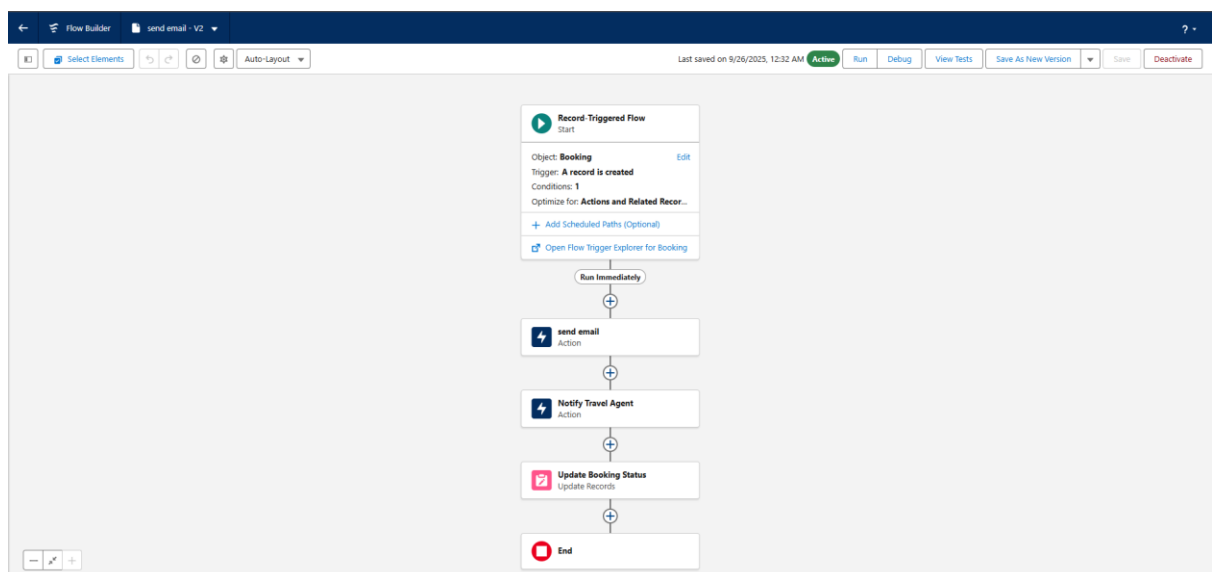
Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
Record Lock	1	Step 1	Lock the record from being edited		User: Chibella, Tedla	Final Rejection

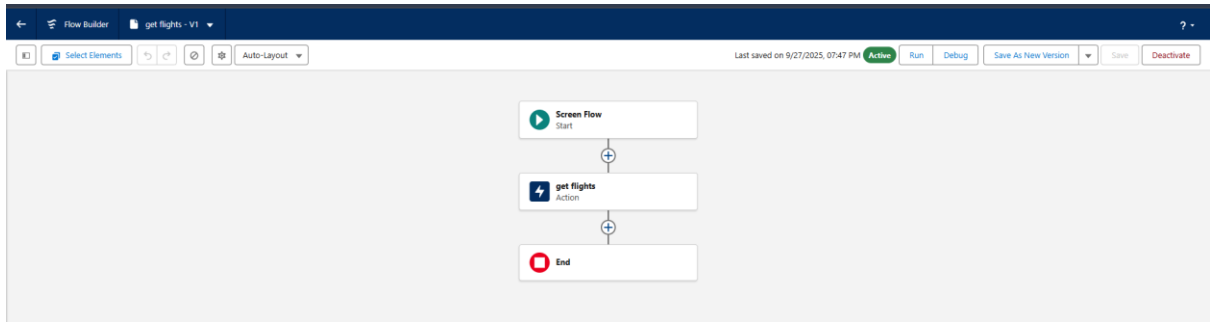
Action	Type	Description
Record Lock	Record Lock	Lock the record from being edited

Action	Type	Description
Record Lock	Record Lock	Unlock the record for editing

## 4. Flow Builder

- **Purpose:** Automate guided or complex processes, with multiple types of flows:
  1. **Screen Flow** – User input form (e.g., booking request form).
  2. **Record-Triggered Flow** – Automatically update status when a booking is created.
  3. **Scheduled Flow** – Daily check to send reminders for upcoming bookings.
  4. **Auto-launched Flow** – Triggered by Apex or Process Builder for automated tasks.





## 5. Field Updates

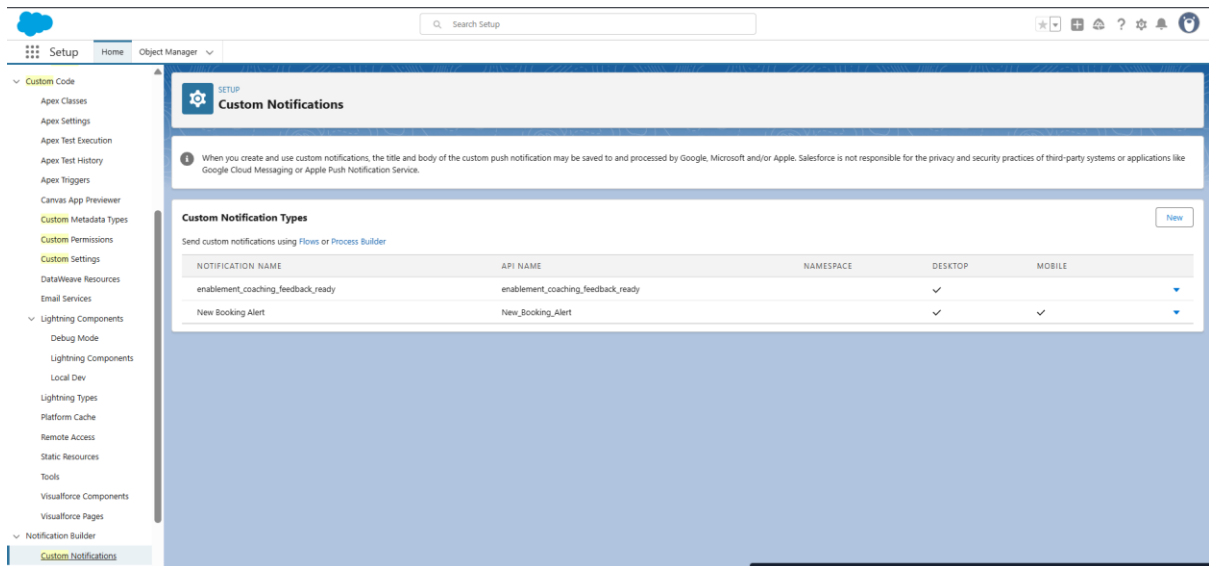
- **Purpose:** Automatically update fields based on rules or flows.
- **Example:** Update Status\_\_c to “Pending Approval” when a booking exceeds a certain value.

## 6. Tasks

- **Purpose:** Assign follow-up actions to users.
- **Example:** Create a task for Travel Agent to call the Contact after booking confirmation.

## 7. Custom Notifications

- **Purpose:** Alert users inside Salesforce via the notification bell or mobile app.
- **Example:** Notify the admin when a booking is canceled or rescheduled.



## Conclusion:

In Phase 4, the TourEase project focused on automating business processes to enhance efficiency and accuracy in travel booking management. By implementing validation rules, workflow rules, process builder, approval processes, and various types of flows, the system ensures data integrity, automates notifications, and streamlines approvals. Additional tools like email alerts, field updates, tasks, and custom notifications further improve communication and task management for users. Overall, Phase 4 demonstrates how Salesforce process automation can reduce manual effort, enforce consistent business rules, and provide a seamless, responsive experience for both admins and end-users in the TourEase application.