**Phase 4: Process Automation (Admin)**

1. **Validation Rules**

* Purpose: Ensure data quality before saving records.
* **Example:**
* In **Booking**: End Time must be after Start Time.

1. **Workflow Rules**

* Trigger simple actions (email, field update, task) when a condition is met.
* **Example:**
* When **Payment Status = Failed**, send an email alert to Customer.

1. **Process Builder**

* More powerful than Workflow Rules.
* **Example:**
* If **Booking Status = Confirmed**, then update related **Payment record → Status = Pending**.

1. **Approval Process**

* Used when manager approval is required.
* **Example:**
  + **Refund Request Approval :**
* **Step 1:** Customer submits refund → Status = Pending Approval
* **Step 2:** Manager approves → Status = Approved (trigger refund flow)
* **Step 3:** Manager rejects → Status = Rejected (notify customer)

1. **Flow Builder**

This is the future of automation in Salesforce. Types:

1. **Screen Flow** → Interactive user form

* Customer Service rep logs a Maintenance Ticket using a guided flow.

1. **Record-Triggered Flow** → Auto-run on record create/update

* When a Booking is created → send confirmation email.

1. **Scheduled Flow** → Runs at a scheduled time

* Every day at midnight, check for **upcoming bookings** and send reminders.

1. **Autolaunched Flow** → Triggered from Apex/Process Builder (no UI).
2. **Email Alerts**

* Predefine templates for notifications.
* **Example:**
* Booking Confirmed → Send “Your booking is confirmed at [Station Name]” email.

1. **Field Updates**

* If Payment Status = Success, auto-update Booking Status = Completed.

1. **Tasks**

* Auto-create tasks for users.
* **Example:**
* If a **Maintenance Ticket** is created, assign a **Task** to Station Manager: *“Inspect station immediately.”*

1. **Custom Notifications**

* Push in-app or mobile alerts.
* **Example:**
* **If Station Status = Under Maintenance, notify Operator: *“Station X is down, reroute users.”***