

Phase 4 — Process Automation

1. Validation Rules

Setup → Object Manager → Discount Booking → Validation Rules → New

- Booking_Require_Customer
- Redemption_Date_After_Promotion_Start
- Total_Discount_NonNegative

Validation Rules

5 Items, Sorted by Rule Name

New

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY	
Booking_Require_Customer	Top of Page	"Customer is required for Discount Booking."	✓	Tanvi Markad, 21/09/2025, 11:42 pm	▼
Redemption_After_Promotion_Start	Top of Page	"Redemption date cannot be before campaign start date."	✓	Tanvi Markad, 21/09/2025, 11:43 pm	▼
Redemption_Date_Required_if_Status	Top of Page	"Redemption Date is required if status is Redeemed."	✓	Tanvi Markad, 21/09/2025, 11:45 pm	▼
Status_Should_Not_Be_Confirmed_Without_A	Top of Page	"Manager approval required before confirming this booking."	✓	Tanvi Markad, 22/09/2025, 12:05 am	▼
Total_Discount_NonNegative	Top of Page	Total Discount cannot be negative."	✓	Tanvi Markad, 21/09/2025, 11:44 pm	▼

2. Duplicate Prevention

Setup → Duplicate Management → Matching Rules → New

- Booking_Duplicate_Match

SETUP

d Matching Rules

All Matching Rules

Help for this Page

What Are Matching Rules?

[Expand]

View: All Matching Rules Create New View

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All


New Rule

Action	Rule Name ↑	Object	Status	Description	Last Modified Date	Last Modified By
Del Deactivate	Booking_Duplicate_Match	Discount Booking	Active	Prevent duplicate bookings based on Customer and Redemption Date	22/09/2025	TMark
Deactivate	Standard Account Matching Rule	Account	Active	Matching rule for account records. More info	20/09/2025	TMark
Deactivate	Standard Contact Matching Rule	Contact	Active	Matching rule for contact records. More info	20/09/2025	TMark
Deactivate	Standard Lead Matching Rule	Lead	Active	Matching rule for lead records. More info	20/09/2025	TMark

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Setup → Duplicate Management → Duplicate Rules → New

- Block_Duplicate_Rule

 SETUP

Duplicate Rules

All Duplicate Rules [Help for this Page](#)

What Are Duplicate Rules? [\[Expand \]](#)

View: All Duplicate Rules

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Rule Name	Description	Object	Matching Rule	Active	Last Modified By	Last Modified Date
Standard Account Duplicate Rule	Identify accounts that duplicate other accounts.	Account	Standard Account Matching Rule	✓	TMark	20/09/2025
Standard Contact Duplicate Rule	Identify contacts that duplicate other contacts and leads.	Contact	Standard Contact Matching Rule Standard Lead Matching Rule	✓	TMark	20/09/2025
Standard Lead Duplicate Rule	Identify leads that duplicate other leads and contacts.	Lead	Standard Contact Matching Rule Standard Lead Matching Rule	✓	TMark	20/09/2025

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

3. Email Templates & Alerts

Setup → Email Templates → New → Email Template

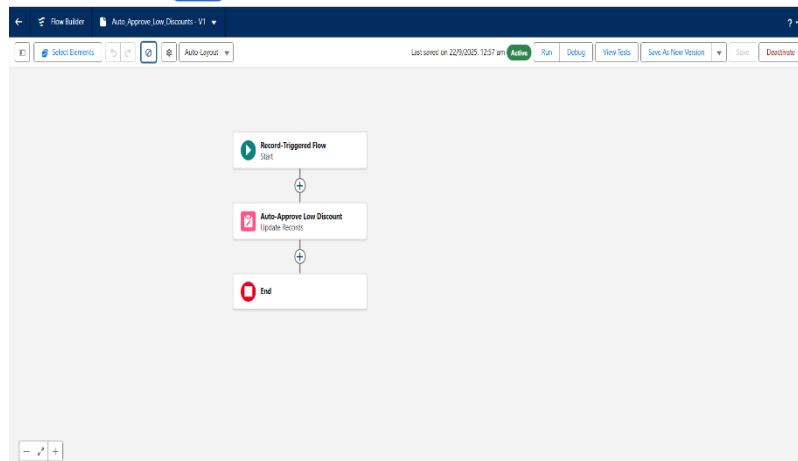
- High_Discount_Approval_Alert
- Booking_Confirmation_Notification

Action		Email Template Name	Template Type	Available For Use	Description	Author	Last Modified Date
Edit	Del	Appointment for Unauthenticated User using Appointment Types - For Amazon Chime.	Custom	✓	Email template for confirmation of an appointment when appointments are scheduled using appointment types with Amazon Chime.	sfdcadm	20/09/2025
Edit	Del	Appointment for Unauthenticated User using Appointment Types - For third party.	Custom	✓	Email template for confirmation of an appointment when appointments are scheduled using appointment types with third party video applications.	sfdcadm	20/09/2025
Edit	Del	Appointment for Unauthenticated User using Engagement Channels-For Amazon Chime.	Custom	✓	Email template for confirmation of an appointment when appointments are scheduled using engagement channels with Amazon Chime.	sfdcadm	20/09/2025
Edit	Del	Appointment for Unauthenticated User using Engagement Channels-For third party.	Custom	✓	Email template for confirmation of an appointment when appointments are scheduled using engagement channels with third party video applications.	sfdcadm	20/09/2025
Edit	Del	Booking_Confirmation_Notification	Text	✓	"Template for sending booking confirmation emails to customers."	TMark	22/09/2025
Edit	Del	Canceled Service Appointment Confirmation Email	Custom	✓	Email Template to confirm canceling of a service appointment.	sfdcadm	20/09/2025
Edit	Del	Commerce Reorder Portal: Invitation	Custom	✓	Invite a contact to a Commerce Reorder Portal.	autoproc	20/09/2025
Edit	Del	Group Service Appointments Enrollment Confirmation Email	Custom	✓	Email Template to confirm enrollment of an attendee to a Group service appointment.	sfdcadm	20/09/2025
Edit	Del	Marketing_Product Inquiry Response	Text	✓	Standard email response to website product inquiries	TMark	20/09/2025
Edit	Del	Rescheduled Service Appointment Confirmation Email	Custom	✓	Email Template to confirm rescheduling of a service appointment.	sfdcadm	20/09/2025
Edit	Del	Sales: New Customer Email	Text	✓	Email to new customers	TMark	20/09/2025
Edit	Del	Scheduled Service Appointment Confirmation Email	Custom	✓	Email Template to confirm scheduling of a service appointment.	sfdcadm	20/09/2025

4. Flows

Setup → Flows → Record-Triggered Flow

- **Auto_Approve_Low_Discount**
→ If Discount < ₹500, auto-approve and update Status = "Confirmed"



5. Approval Process

Setup → Approval Processes → Discount Booking → Use Standard Wizard

- High Discount Approval Process

Approval Processes

3. Create a custom user hierarchical relationship field
4. Create email templates
5. Create an approval process using either the Jump Start or Standard Wizard
6. Add Approval History Related List to all page layouts
7. Activate the process to deploy to your users

Manage Approval Processes For: **Discount Booking**

A listing of both active and inactive approval processes for **Discount Bookings** is displayed below. To create a new approval process, click Create New Approval Process then select Use Jump Start Wizard to set up your approval process in a few short steps. Or, select Use Standard Wizard to configure all approval options.

Create New Approval Process

Active Approval Processes [Reorder](#)

No approval processes available

Inactive Approval Processes

Action	Approval Process Name	Description
Edit Delete	Discount Booking Approval	Approval process for discount bookings: auto-approve low-value discounts (< ₹500) via Flow, and require manager approval for higher discounts

6. Custom Notification

Setup → Notification Builder → Notification Types → New

- Critical Booking Alert

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.

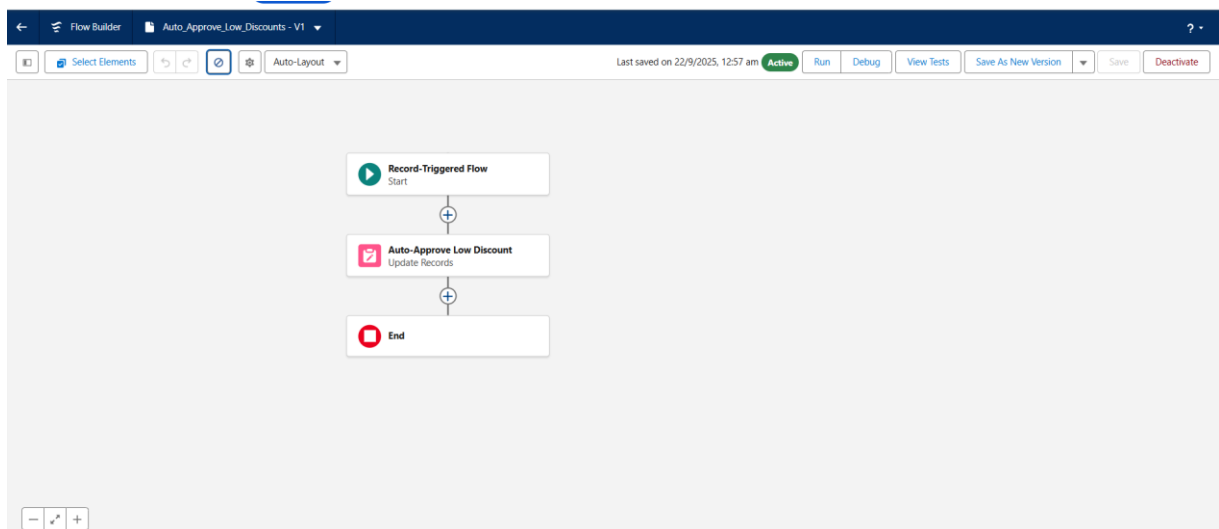
Custom Notification Types

New

Send custom notifications using [Flows](#) or [Process Builder](#)

NOTIFICATION NAME	API NAME	NAMESPACE	DESKTOP	MOBILE	
Critical_Booking_Alert	Critical_Booking_Alert		✓	✓	▼
enablement_coaching_feedback_ready	enablement_coaching_feedback_ready		✓		▼

7. Tasks



Phase 4 completed with all process and ready to go for phase 5.

