Project Title: Event Venue CRM

Phase 4 — Process Automation (Admin)

4.1 Validation Rules

Purpose: Enforce data integrity before records are saved.

Examples:

1. Booking End Date/Time must be after Start Date/Time

    o Object: Booking

    o Rule: End_DateTime__c > Start_DateTime__c

    o Error Message: "End Date/Time must be after Start Date/Time."

2. Number of Guests cannot exceed Venue Capacity

    o Object: Booking

    o Rule: Number_of_Guests__c <= Venue__r.Capacity__c

    o Error Message: "Number of Guests exceeds Venue Capacity."

Setup:

- Setup → Object Manager → Booking → Validation Rules → New → Enter formula, error message, save & activate.

4.2 Workflow Rules *(Legacy, optional)*

Purpose: Automate simple tasks like email alerts, field updates, or tasks.

Example:

- Send email to Venue Manager when a Booking is **Confirmed**

    o Object: Booking

    o Rule Criteria: Status__c = "Confirmed"

    o Immediate Actions: Email Alert (pre-created template), Field Update, Task creation

Setup:

- Setup → Workflow Rules → New Rule → Select Object → Define Criteria → Add Actions → Activate

4.3 Process Builder

Purpose: Advanced automation combining multiple actions on record create/update.

Example 1: Booking Conflict Notification

1. Object: Booking

2. Trigger: When a record is created or edited

3. Criteria: Conflict__c = TRUE

4. Immediate Actions:

   o **Create Task** → Assign to Venue Manager

   o **Send Email** → Notify Customer

Example 2: Update Payment Status

- When a new Booking Payment is **Completed**, update Booking.Payment_Status__c to reflect total paid

Setup:

- Setup → Process Builder → New → Select Object → Define Criteria → Add Immediate Actions → Save & Activate

4.4 Approval Process

Purpose: Require manager approval for certain bookings (e.g., VIP, corporate events).

Steps:

1. Setup → Approval Processes → New Approval Process → Select Object: Booking

2. Define Entry Criteria: e.g., Booking_Type__c = "Corporate" AND Status__c = "Requested"

3. Approver: Assign to Venue Manager or Manager role

4. Approval Steps:

   o Approve → Status__c = Approved

   o Reject → Status__c = Rejected

5. Optional Actions: Email Alerts, Field Updates

4.5 Flow Builder

Types:

- Screen Flow → User-guided input

- Record-Triggered Flow → Automate on record create/update

- Scheduled Flow → Runs at specific time

- Autolaunched Flow → Triggered via Process Builder, buttons, or Apex

Example: Booking Conflict Automation

1. Trigger: Record-Triggered on Booking create/update

2. Get Records → Get Venue Manager

3. Decision → ConflictExists (check overlapping bookings)

4. Actions → Create Task + Send Custom Notification

Setup:

- Setup → Flows → New Flow → Choose type → Drag elements → Connect → Save & Activate

4.6 Email Alerts

Purpose: Notify users via email when certain events happen.

Example:

- Booking Confirmed → Email to Customer & Venue Manager

- Payment Completed → Email receipt to Customer

Setup:

- Setup → Email Alerts → New → Select Object & Template → Recipients → Save

4.7 Field Updates

Purpose: Automatically update field values based on conditions.

Example:

- Update Booking.Payment_Status__c to "Paid" when total payments ≥ Booking Amount

- Object: Booking → Workflow/Process → Field Update → Save & Activate
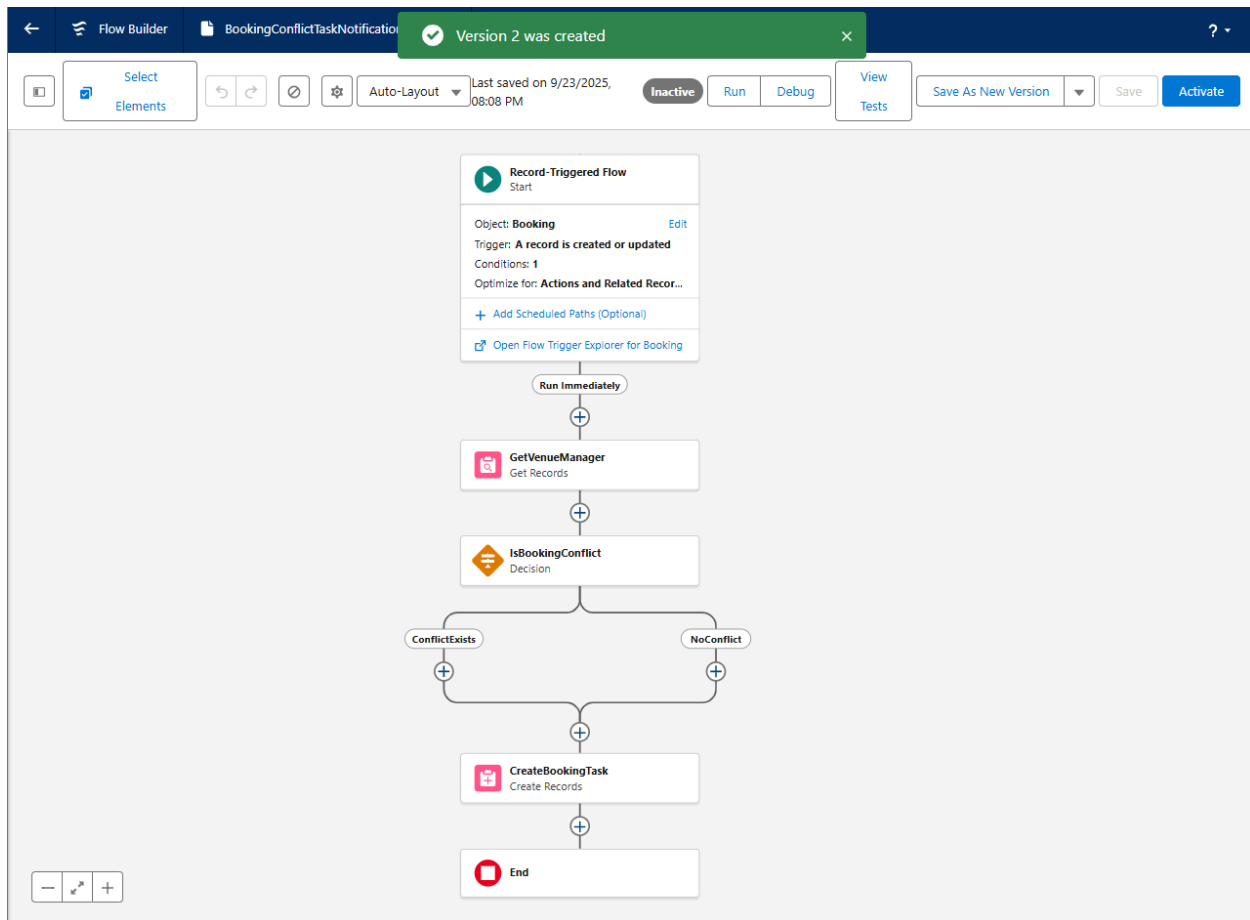

4.8 Tasks

Purpose: Create actionable to-dos automatically.

Example:

- When Booking Conflict Exists → Create Task for Venue Manager to review

- Fields: Subject, Related To (Booking), Assigned To (User), Due Date, Priority

Setup: Flow Builder → Create Records → Set Task fields → Connect to Decision element

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4.9 Custom Notifications

Purpose: In-app and mobile notifications for urgent actions.

Steps:

1. Setup → Notification Builder → Custom Notifications → New

   o Name: BookingConflictAlert

   o Channels: Desktop, Mobile

2. Flow Action: Send Custom Notification

   o Title: "Booking Conflict for {!$Record.Name}"

   o Body: "Booking at {!$Record.Venue__c} overlaps with another booking. Please review."

- o Target Record: Booking Id

- o Recipients: Venue Manager\