Project Title: Venue Connect CRM

Phase 4 — Process Automation (Admin)

4.1 Validation Rules

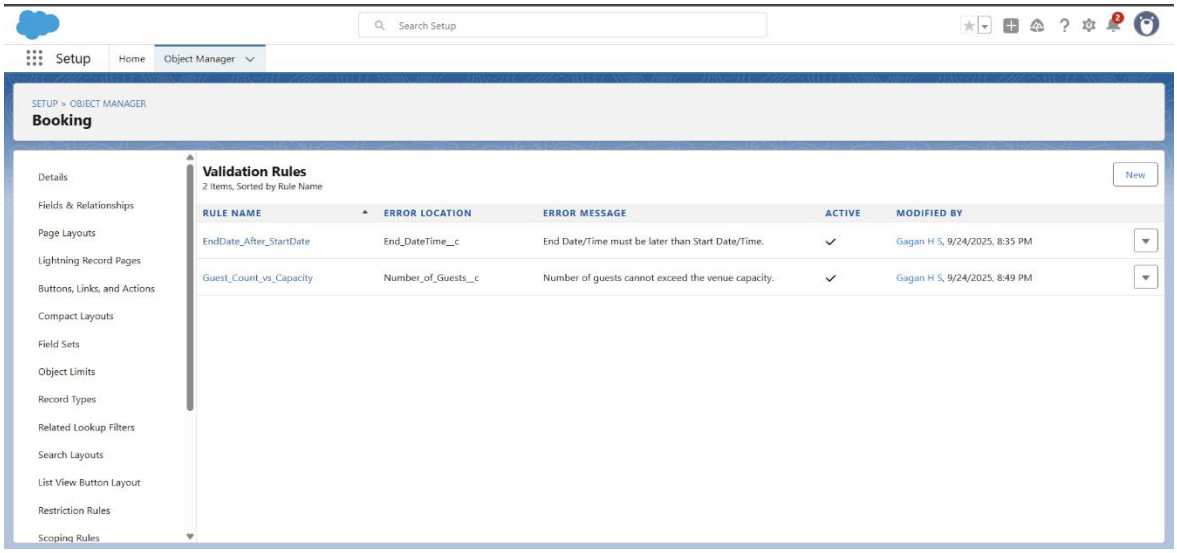
Purpose: Enforce data integrity before records are saved.

Minimum Examples:

1. **End Date/Time must be after Start Date/Time**
   - Object: Booking
   - Rule: End_DateTime__c > Start_DateTime__c
   - Error Message: "End Date/Time must be after Start Date/Time."
2. **Number of Guests ≤ Venue Capacity**
   - Object: Booking
   - Rule: Number_of_Guests__c <= Venue__r.Capacity__c
   - Error Message: "Number of Guests exceeds Venue Capacity."

Setup:

- Setup → Object Manager → Booking → Validation Rules → New → Enter formula → Add error message → Save & Activate



4.2 Workflow Rules *(Legacy, optional)*

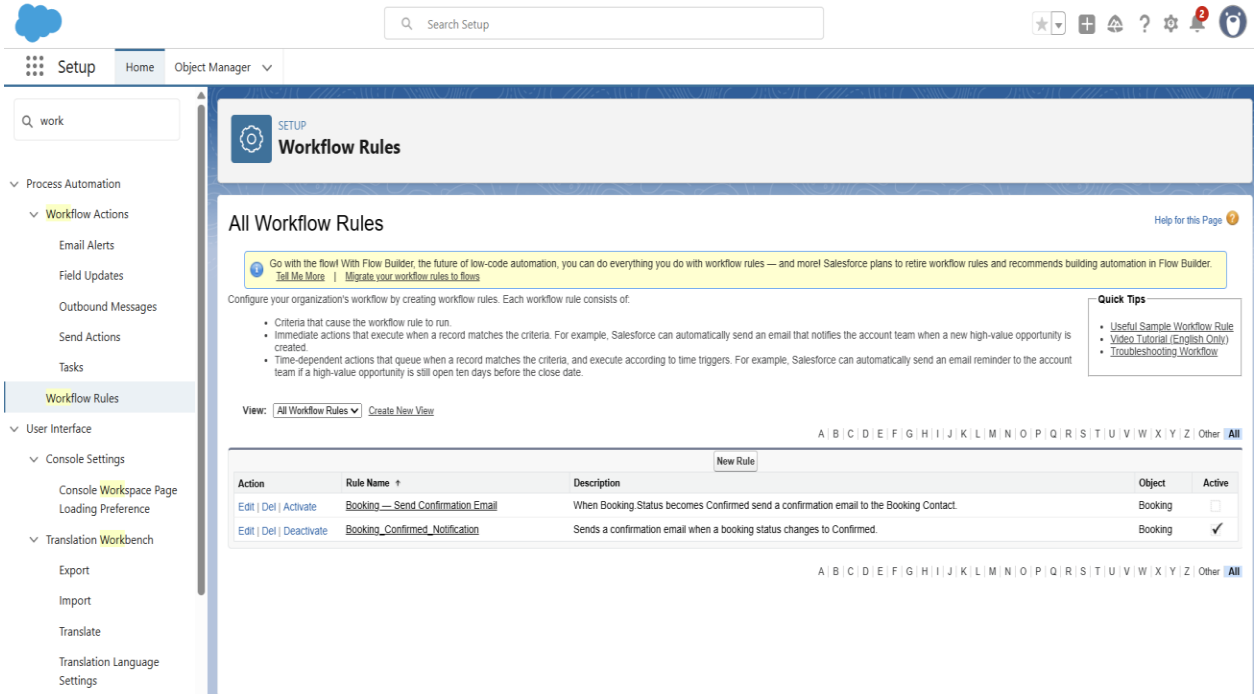
Purpose: Automate simple tasks like email alerts, field updates, or tasks.

Minimum Example:

- Send email when Booking is Confirmed
  - Object: Booking
  - Rule Criteria: Status__c = "Confirmed"
  - Immediate Actions: Email Alert → Booking Confirmation (pre-created)

Setup:

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



4.3 Process Builder

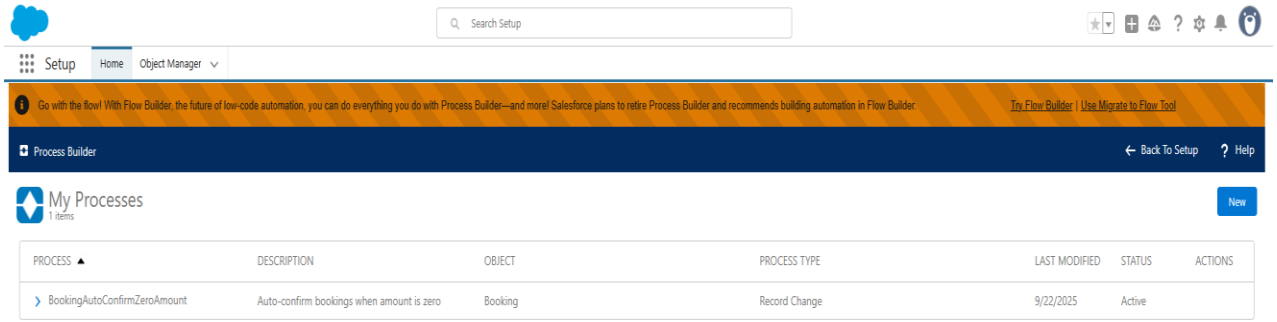
Purpose: Require manager approval for corporate or VIP bookings.

Steps:

1. Setup → Approval Processes → New → Select Object: Booking
2. Entry Criteria: RecordType = Corporate_Event AND Amount__c > 10000
3. Approver: Manager / Venue Manager
4. Approval Steps:
    - Approve → Status__c = Approved
    - Reject → Status__c = Rejected
5. Optional Actions: Email Alerts / Field Updates

Setup:

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



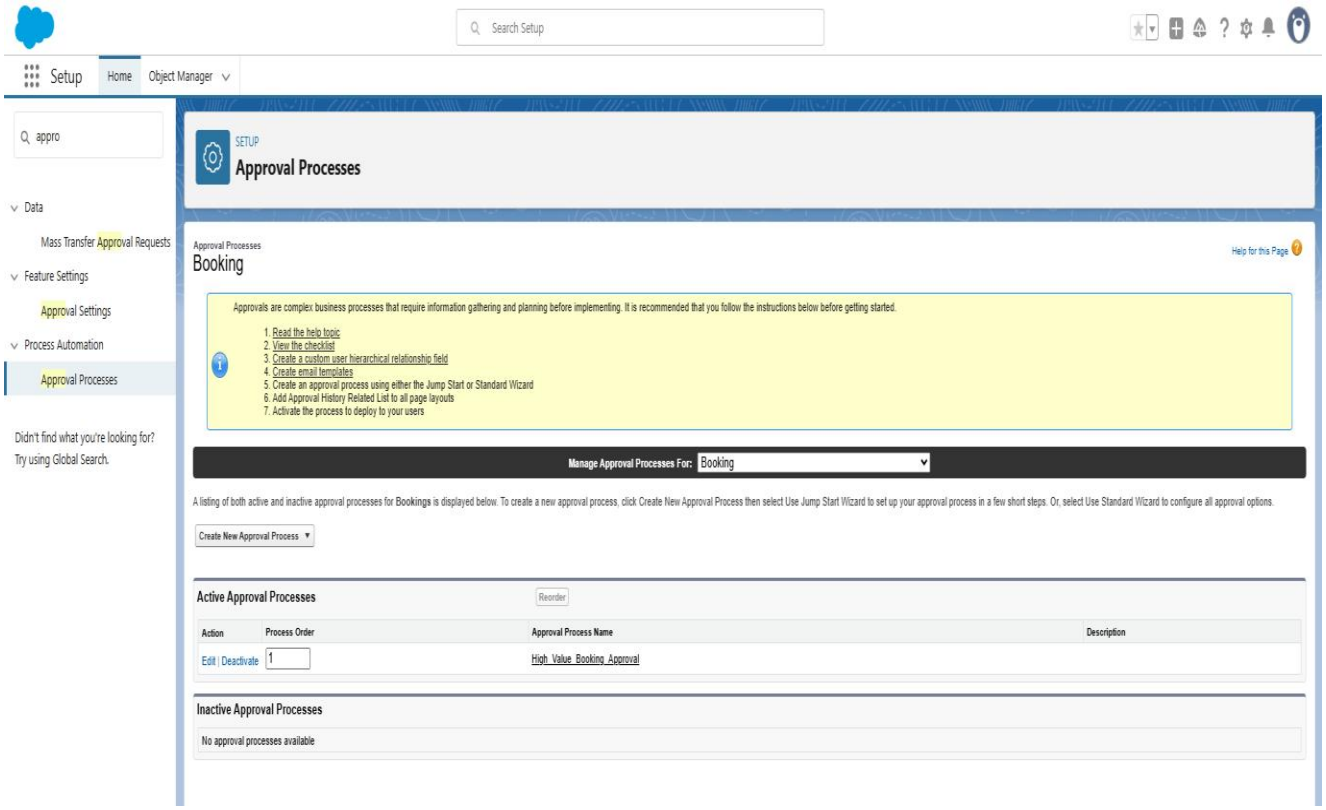
4.4 Approval Process

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:
    - Approve → Status__c = Approved
    - 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

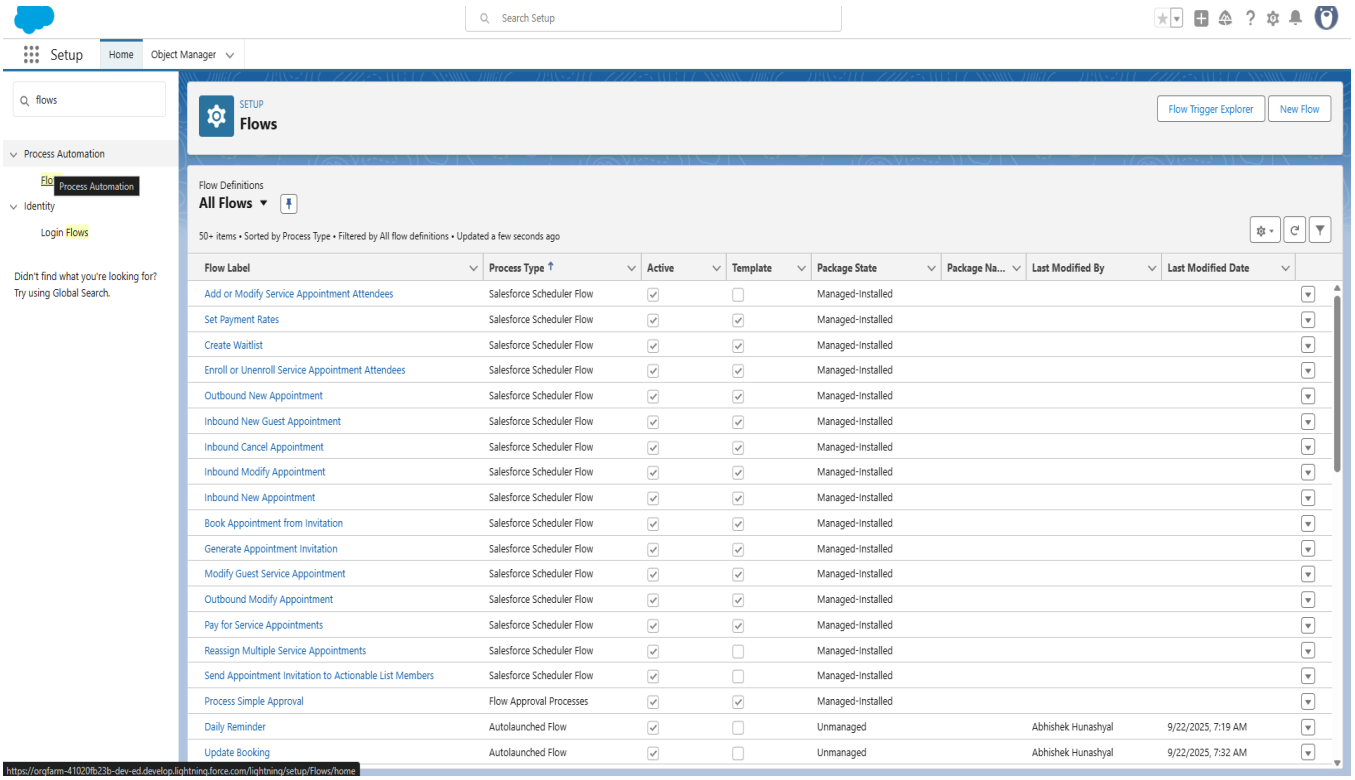
- Scheduled Flow → Runs at specific time
- Autolaunched Flow → Triggered via Process Builder, buttons, or Apex

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.

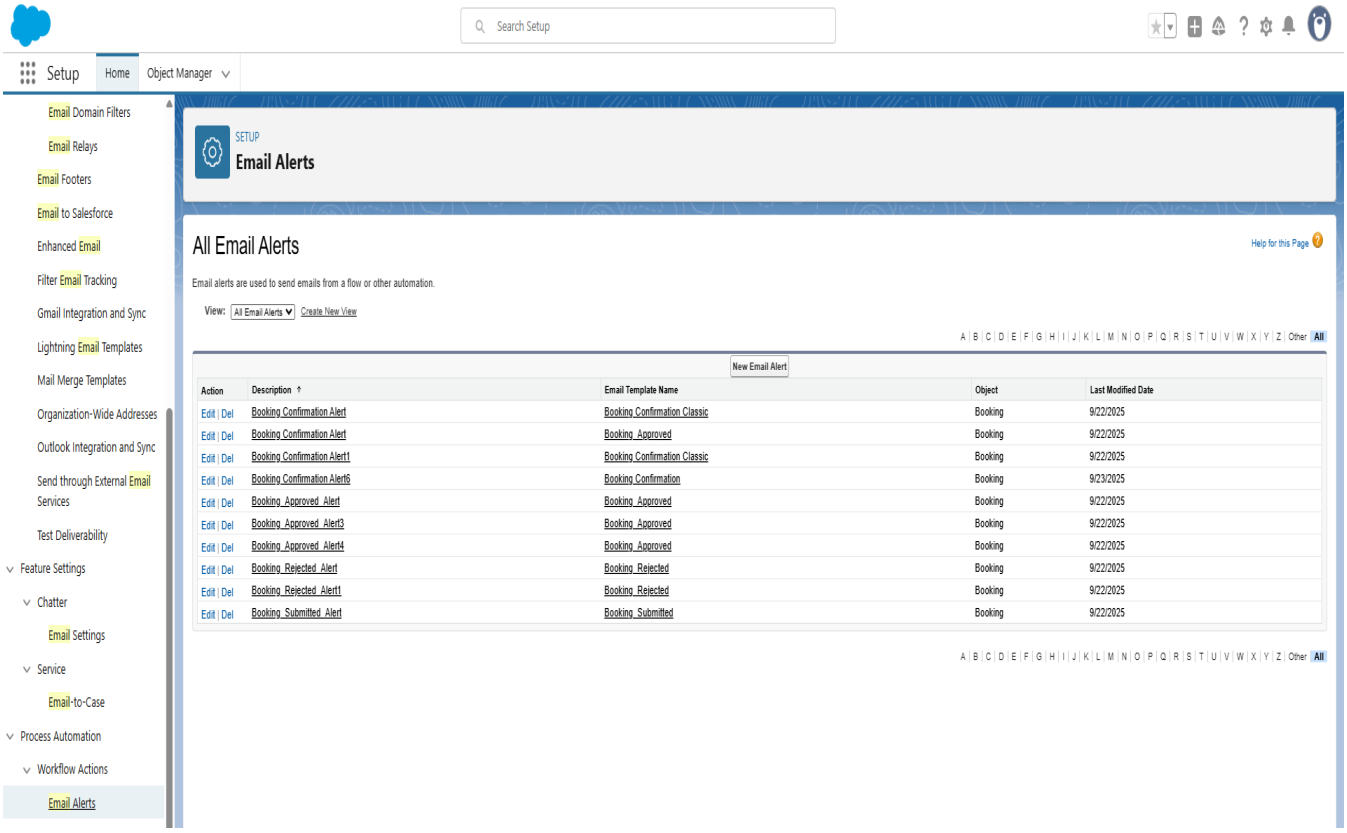
Example:

- Booking Confirmed → Email to Customer & Venue Manager

- Payment Completed → Email receipt to Customer

Setup:

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

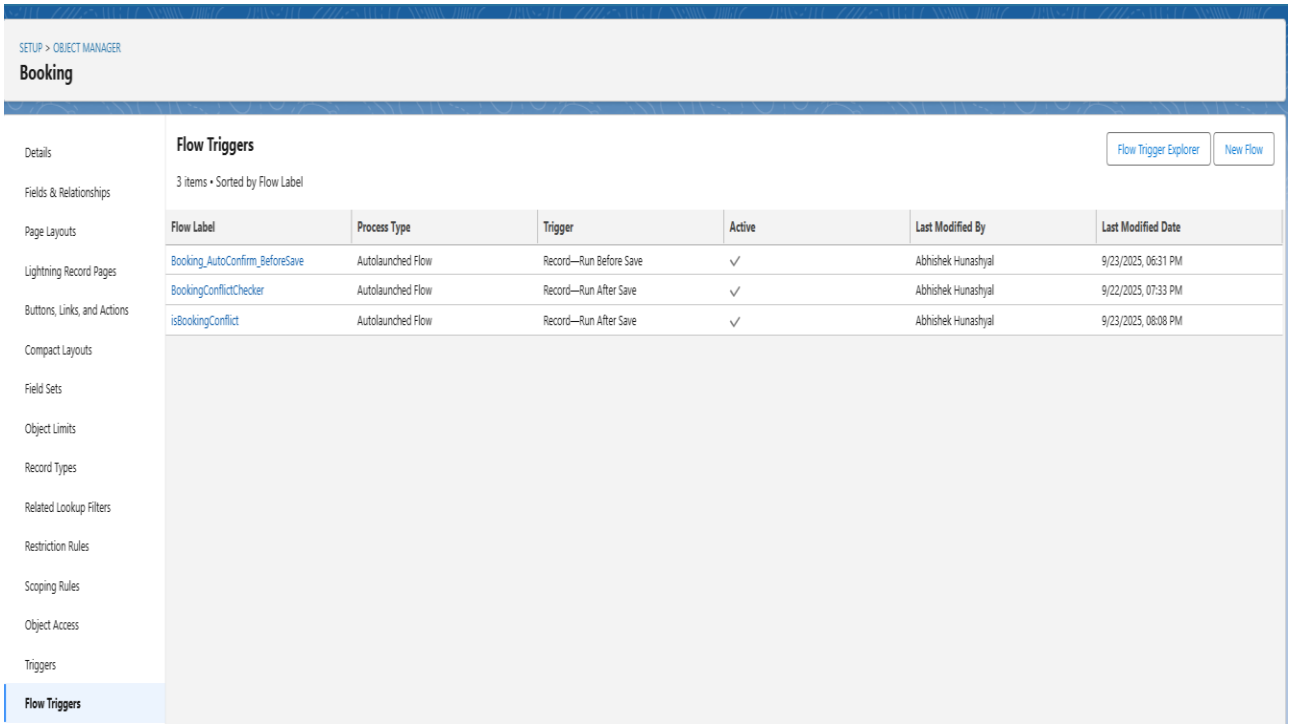


4.7 Field Updates

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



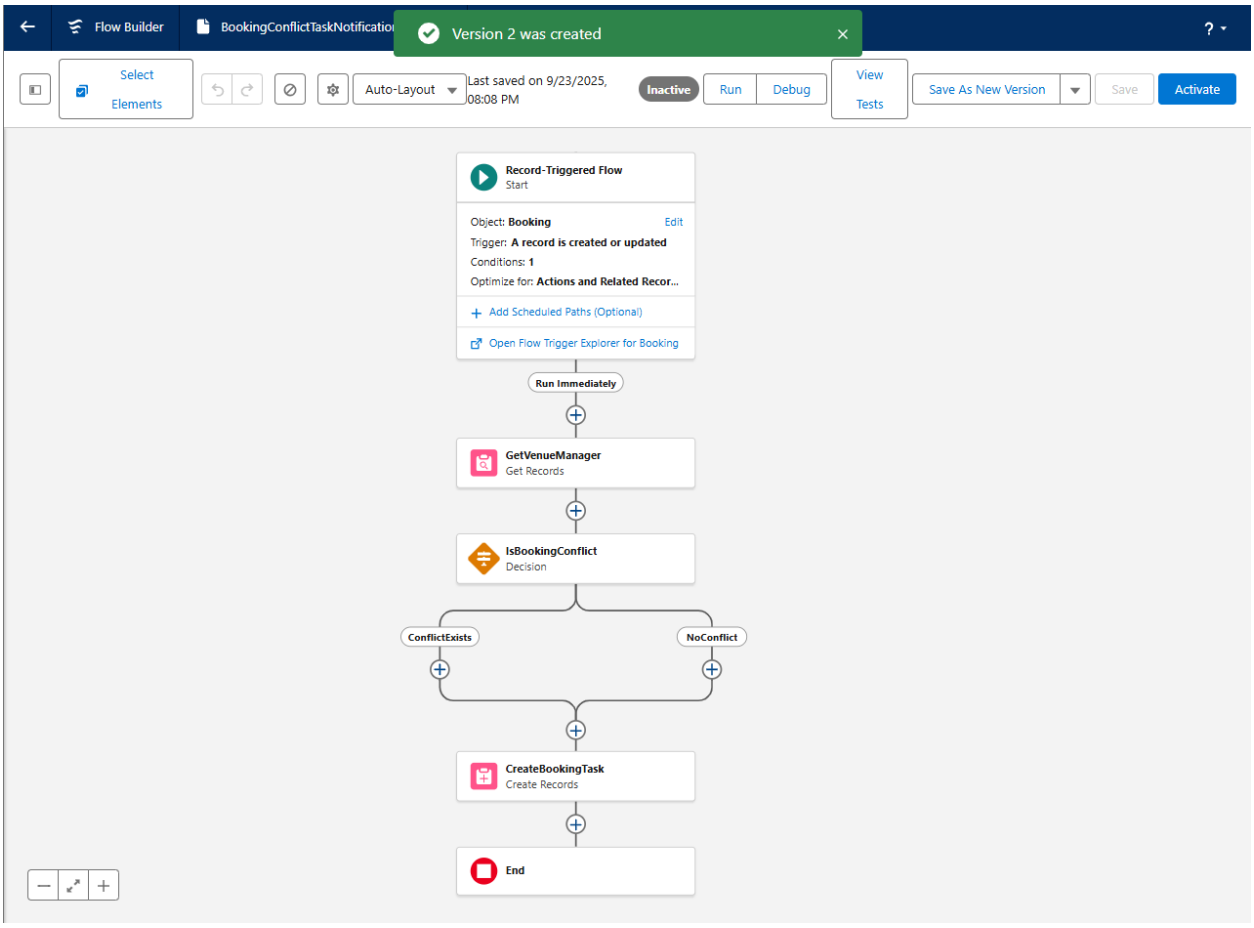
4.8 Tasks

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

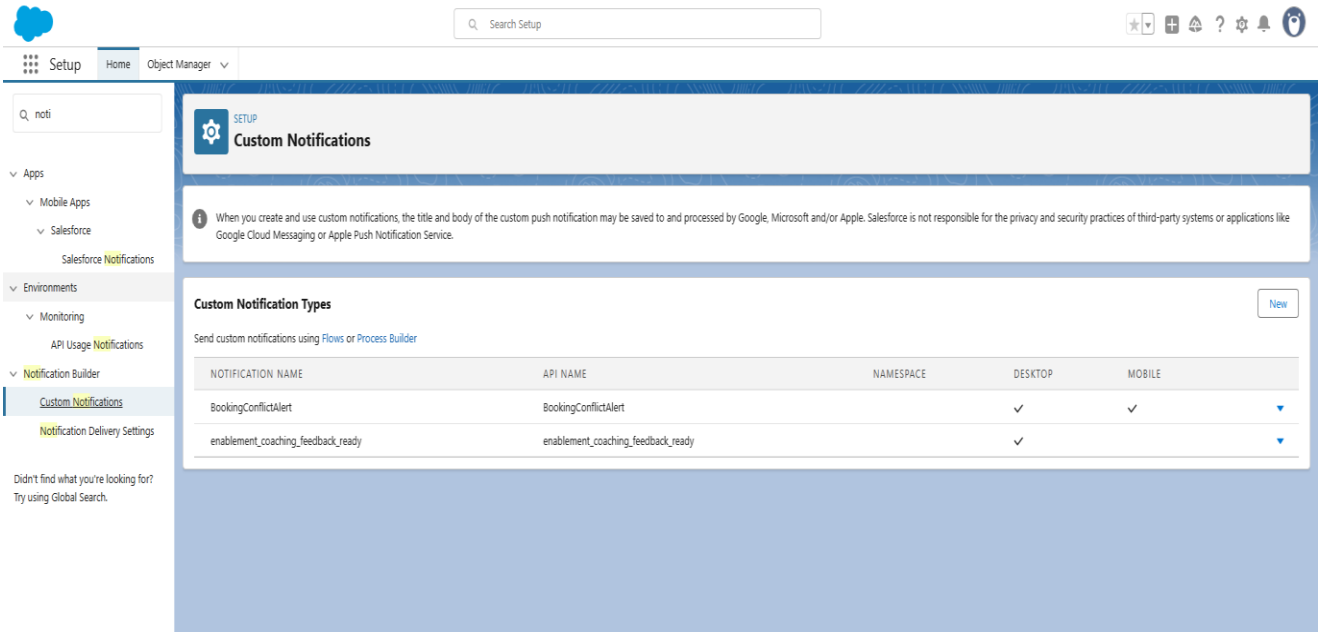
Setup: Flow Builder → Create Records → Set Task fields → Connect to Decision element



4.9 Custom Notifications

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

Steps:

1. Setup → Notification Builder → Custom Notifications → New
    - Name: BookingConflictAlert
    - Channels: Desktop, Mobile
2. Flow Action: Send Custom Notification
    - Title: “Booking Conflict for {!$Record.Name}”
    - Body: “Booking at {!$Record.Venue__c} overlaps with another booking. Please review.”

- Target Record: Booking Id
- Recipients: Venue Manager\