Phase 3: Automation & Business Logic Implementation

1. Objective

Phase 3 focuses on adding **business logic and automation** to make the Visitor Management system dynamic. This includes:

- Automating check-in/check-out processes
- Sending host notifications
- Creating validation rules
- Improving data accuracy and system usability

2. Record-Triggered Flow: Assign Check-In Time

2.1 Purpose

Automatically fill the **Check-In Time** when a visitor record is created.

2.2 Steps

1. Go to **Setup → Flows**.
2. Click **New Flow → Record-Triggered Flow**.
3. Select **Object = Visitor**.
4. Trigger: **A record is created**.
5. Add **Assignment Element**:
   - Variable: $Record.Check_In_Time__c
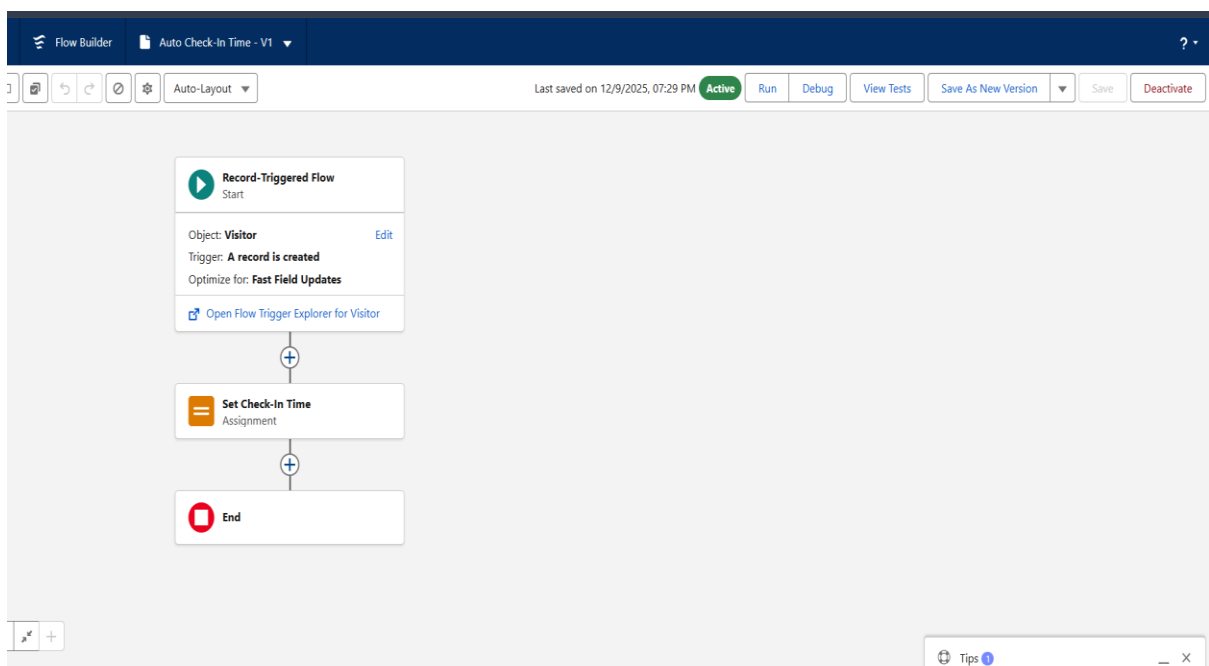   - Value: $Flow.CurrentDateTime
6. Save & activate.

3. Record-Triggered Flow: Assign Check-Out Time

3.1 Purpose

When the visitor is marked as "Checked Out", automatically update the Check-Out Time field.

3.2 Steps

1. Create a new Record-Triggered Flow.
2. Trigger: When a record is updated.
3. Entry Condition: Status = "Checked Out"
4. Assignment:
   - ○ $Record.Check_Out_Time__c = $Flow.CurrentDateTime
5. Save & activate.

4. Email Notification to Host

4.1 Purpose

Notify the host when their visitor checks in.

4.2 Steps

1. Go to Setup → Email Alerts.
2. Create a new email template:
   - ○ Subject: Your visitor has arrived
   - ○ Body: Includes Visitor Name, Check-In Time, Purpose.

3.Create a Record-Triggered Flow**:**

- o   Trigger: Visitor record created.
- o   Action: Send Email Alert to the Host (lookup field).

5. Validation Rules

Helps maintain correct and clean data.

5.1 Prevent Check-Out Before Check-In

Formula:

Check_Out_Time__c < Check_In_Time__c

Error Message: "Check-Out Time cannot be earlier than Check-In Time."

5.2 Ensure ID Proof Number Is Filled

If ID Proof Type is selected but number is empty:

NOT(ISBLANK(ID_Proof_Type__c)) && ISBLANK(ID_Proof_Number__c)

Error Message: "Enter ID Proof Number."

6. Approval Process (Optional)

If your system requires **approval for scheduled visitors**, include:

Steps

1. Setup → Approval Processes
2. Object = **Visitor**
3. Approver = Host / Admin
4. Email notification after approval.

7. Testing

Test each automation with sample records:

Test Case	Expected Output
Create new visitor	Check-In Time auto-filled
Update visitor status to Checked Out	Check-Out Time auto-filled
Create visitor with Host assigned	Email sent to Host
Enter wrong times	Validation rule triggers
Missing ID Proof Number	Error message appears

8. Summary

Phase 3 completes the **automation layer** of the CRM:

- Check-in and check-out automatically recorded

- Host notified instantly

- Validation rules ensure accuracy

- Optional approval workflows improve security