

Hotel Booking Management System

Phase 4: Process Automation (Admin)

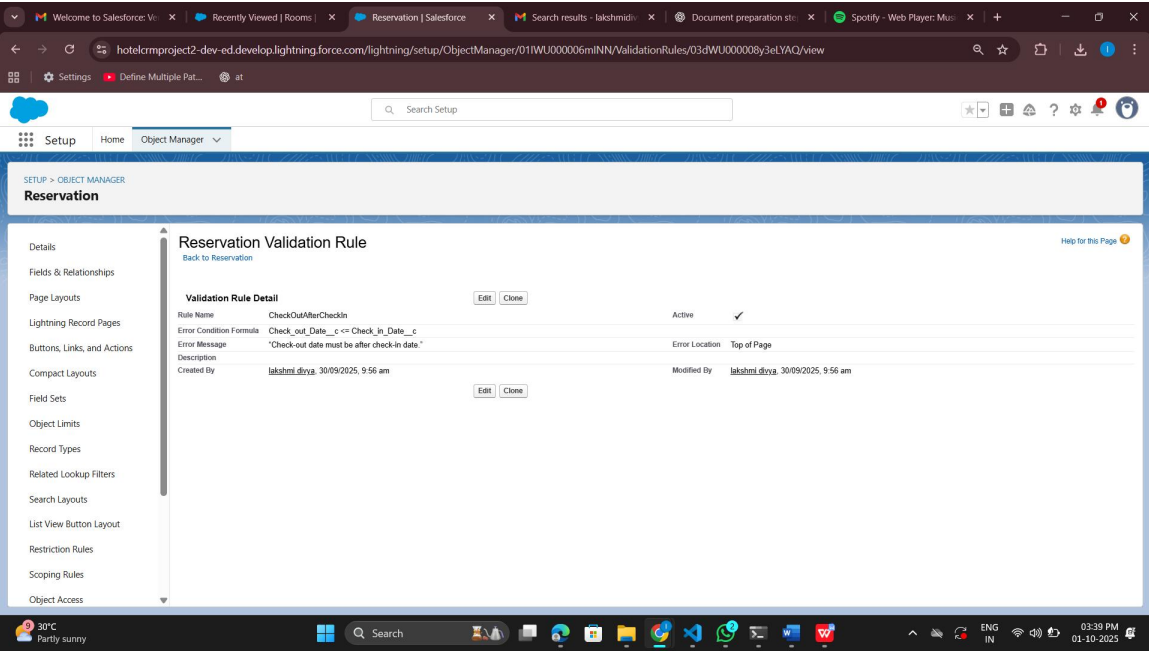
1. Objective

The goal of this phase is to automate booking and check-in/out processes using Salesforce automation tools such as Validation Rules, Approval Processes, Flows, Email Alerts, and Notifications.

2. Validation Rules

Ensure data integrity by preventing invalid entries:

| Rule | Description |
|--------------------------------|---|
| Check-out Date > Check-in Date | Prevents users from entering invalid booking dates. |



3. Approval Process

Define an approval process for specific booking types:

- VIP bookings require Manager approval.
- Group bookings require Manager approval.

The screenshot shows the Salesforce Setup interface for an Approval Process. The left sidebar contains navigation links for Data, Feature Settings, Process Automation, and Approval Processes. The main content area displays the details for the 'Reservation: VIP_Group_Approval' process.

Process Definition Detail

| Field | Value |
|------------------------------------|---|
| Process Name | VIP_Group_Approval |
| Unique Name | VIP_Group_Approval |
| Description | OR/ VIP_c TEXT(Reservation_Type__c) = "Group" |
| Record Editability | Administrator OR Current Approver |
| Approval Assignment Email Template | Reservation Approval Request |
| Initial Submitters | Reservation Owner |
| Created By | lakshmi.doya |
| Modified By | lakshmi.doya |

Initial Submission Actions

| Action | Type | Description |
|-------------|-------------|-----------------------------------|
| Record Lock | Record Lock | Lock the record from being edited |

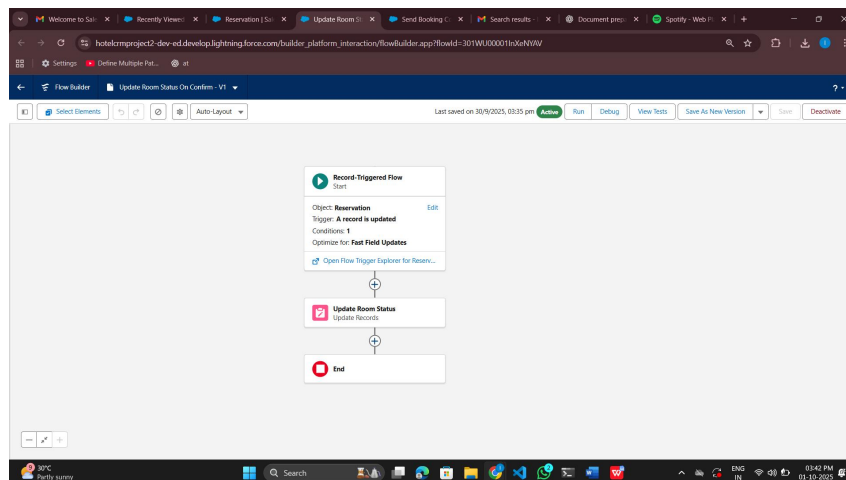
Approval Steps

| Action | Step Number | Name | Description | Criteria | Assigned Approver | Reject Behavior |
|--------------|-------------|-----------------|---|----------|-------------------|-----------------|
| Show Actions | 1 | ManagerApproval | Manager approves VIP or Group reservation | | User lakshmi.doya | Final Rejection |

4. Record-Triggered Flows

Automate room status updates:

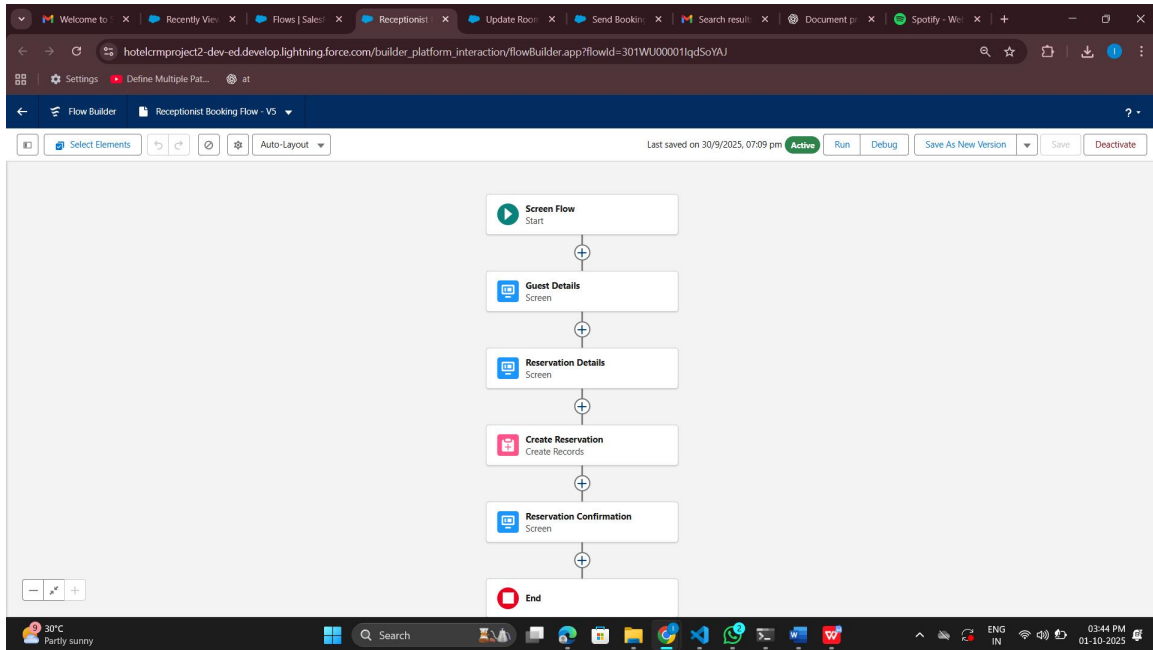
- When a reservation is confirmed → Room status updates to 'Booked'.
- When a reservation is checked out → Room status updates to 'Available'.



5. Screen Flow

Receptionist-facing guided flow:

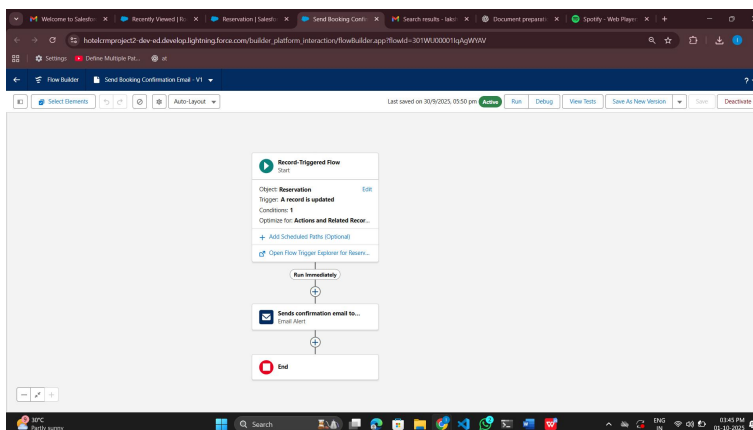
- Booking form that collects guest details, room selection, and reservation dates.
- Automatically saves reservation records.



6. Email Alerts

Send automated emails for key actions:

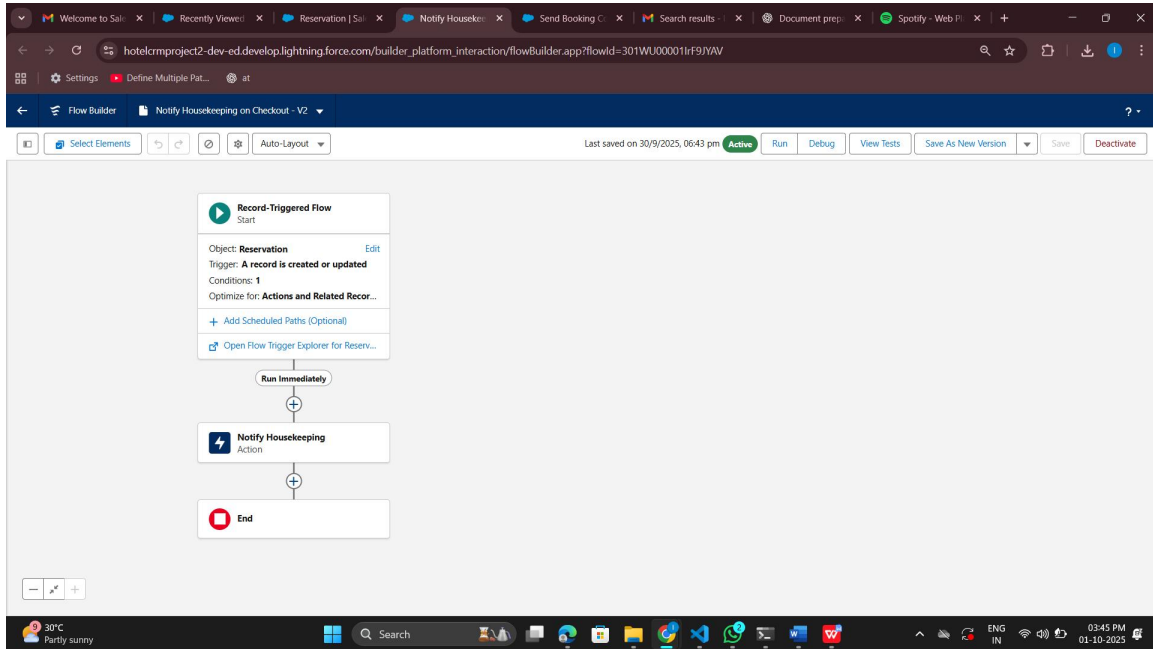
- Booking Confirmation → Sent to guest after reservation is saved.
- Check-in Reminder → Sent a day before guest arrival.



7. Custom Notifications

Internal notifications for staff:

- Notify housekeeping staff when a guest checks out for room cleaning.



8. Testing Plan

- Try to save reservation with invalid dates → Validation Rule should block.
- Create VIP booking → Should trigger approval process.
- Confirm reservation → Room status updates automatically.
- Complete check-out → Notification goes to housekeeping.
- Verify booking form flow works end-to-end.
- Check if email alerts are triggered correctly.

9. Conclusion

The automation processes defined in this phase ensure smooth booking, accurate data entry, and timely communication with both staff and guests.