

TITLE: “Smart Hotel Booking Management System “

Phase 4: Process Automation (Admin)

Goal: Automate booking handling, check-in reminders, and escalations so bookings are tracked, confirmed, and followed up with minimal manual Effort

1. Validation Rules:

- **Purpose:** Enforce data quality and prevent risky actions (e.g., approving a high-risk claim). These run at save-time and block invalid states.

High_Booking_Amount_Validation – prevent saving very high-value bookings without manager approval.

- Logic: if `Booking_Amount__c > 100000 AND Status__c = Confirmed` then block.

Error Message: “High-value bookings require manager approval.” (placed on `Status__c`)

SETUP

Object Manager

Booking Validation Rule

[Back to Booking](#)

Validation Rule Detail

EditClone

Rule Name	Check_Out_Date_Validation	Active	✓
Error Condition Formula	Check_out_Date__c <= Check_in_Date__c		
Error Message	Check-out date must be after check-in date	Error Location	Check-out Date
Description			
Created By	Shaik Yasmin, 9/23/2025, 8:47 AM	Modified By	Shaik Yasmin, 9/23/2025, 8:47 AM

EditClone

Validation Rule	Field	Logic	Error Message
Check-in Date Valid	Checkin_Date__c	Checkin_Date__c >= TODAY()	“Check-in date cannot be in the past.”
Check-out Date Valid	Checkout_Date__c	Checkout_Date__c > Checkin_Date__c	“Check-out date must be after the check-in date.”
Guest Limit	Number_of_Guests__c	Number_of_Guests__c > Room__r.Capacity__c	“Number of guests exceeds room capacity.”
Room Selection	Room__c	ISBLANK(Room__c)	“Please select a room for this booking.”

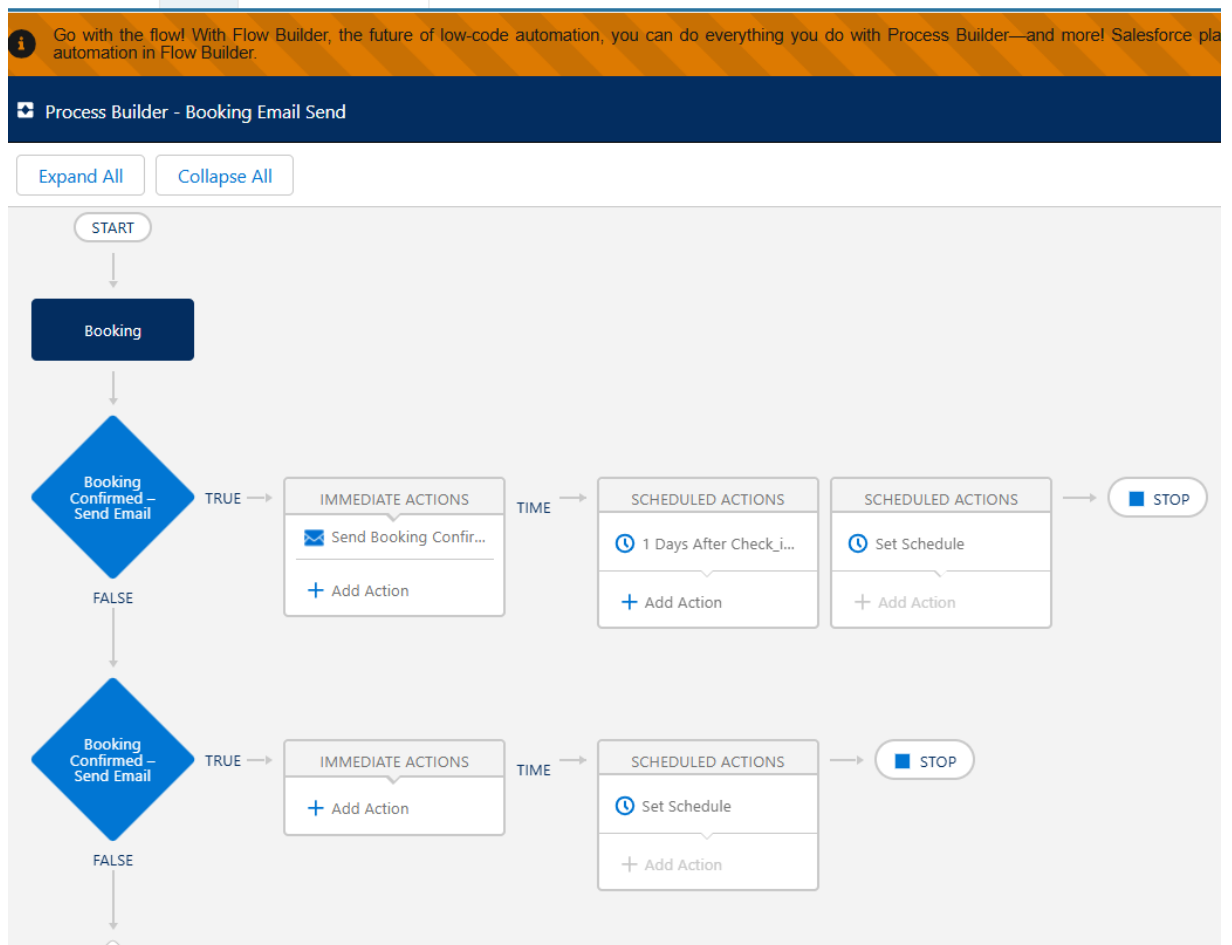
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- **Purpose:** Workflow Rules in Salesforce help automate immediate actions when certain conditions are met (like sending alerts, updating fields, or assigning tasks).
- **Example of Workflow Rule**

- **Object:** Insurance Claim • **Rule Criteria:** Risk Score ≥ 70
- **Action:**
 - Send **Email Alert** to the Fraud Analyst.
 - Create a **Task** for the Adjuster: “*Review High-Risk Claim.*”

- **Purpose:** Process Builder allows multiple conditions, multiple actions, and record updates across objects.

- **Trigger:** When **Booking__c** is created or updated
- **Condition(s):**
 1. **VIP__c = TRUE**
 2. **Booking_Amount__c > 100000**
- **Action(s):**
 1. **Update Booking Record:**
 - **Field:** **Status__c** → **New Value:** **Needs Manager Review**
 2. **Email Alert: Notify Booking Manager of VIP or High-Value Booking**
 3. **Task: Create a Task for Manager:**
 - **Subject:** “Review VIP / High-Value Booking”
 - **Related To:** **Booking__c**
 - **Owner:** **Booking Manager**
 - **ActivityDate:** **TODAY() + 1**



4. Approval Process:

- **Purpose:** Require manager approval for high-value bookings. Locks the record until the manager makes a final decision
- Approval process name: High Value Claim Approval ○ Entry criteria: $\text{Claim_Amount_c} > 500000$

Approval Process Details

- Approval Process Name: High Value Booking Approval
- Entry Criteria: $\text{Booking_Amount_c} > 100000$
- Approver: Booking Manager (can be a specific user or manager role)

Initial Submission Actions


- Lock Record: Prevent users from editing the booking while under review
- Send Submission Email: Notify the submitter that the booking is awaiting approval

Final Approval Actions

1. Field Update: $\text{Status_c} = \text{Approved}$
 - Field Update Name: $\text{Set_Status_Approved}$
2. Email Alert: Send Approval Confirmation to the Customer

Final Rejection Actions

1. Field Update: $\text{Status_c} = \text{Rejected}$
 - Field Update Name: $\text{Set_Status_Rejected}$
2. Email Alert: Notify Booking Manager or Analyst of the rejection



SETUP

Approval Processes

Approval Processes

Booking: Status Submitted

[Back to Approval Process List](#)

[Help for this Page](#)

Process Definition Detail

Edit

Clone

Deactivate

Process Name	Status Submitted	Active	✓
Unique Name	Status_Submitted	Next Automated Approver Determined By	
Description			
Entry Criteria	Booking: Status EQUALS Submitted		
Record Editability	Administrator ONLY	Allow Submitters to Recall Approval Requests	<input type="checkbox"/>
Approval Assignment Email Template	Booking Confirmation Template		
Initial Submitters	Booking Owner		
Created By	Shaik Yasmin, 9/25/2025, 10:32 AM	Modified By	Shaik Yasmin, 9/25/2025, 11:33 AM

Initial Submission Actions

Add Existing

Add New

Action	Type	Description
Record Lock		Lock the record from being edited

Approval Steps

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
Show Actions Edit	1	Manager Approval	Step for approving Draft bookings before they become Pending Approval.		Approval based on first response User: yassu Finance, Yasmin Manager	Final Rejection
Show Actions Edit	2	Set Status to Approved	Update Status to Approved when manager approves the booking		Approval based on first response User: yassu Finance, Yasmin Manager	Final Rejection

Record Lock

Lock the record from being edited

Approval Steps

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
Show Actions Edit	1	Manager Approval	Step for approving Draft bookings before they become Pending Approval.		Approval based on first response User: yassu Finance, Yasmin Manager	Final Rejection
Show Actions Edit	2	Set Status to Approved	Update Status to Approved when manager approves the booking		Approval based on first response User: yassu Finance, Yasmin Manager	Final Rejection

Final Approval Actions

Add Existing

Add New

Action	Type	Description
Edit Remove	Record Lock	Lock the record from being edited
Edit Remove	Email Alert	Notify Booking Owner on Approval
Edit Remove	Field Update	Set Status to Approved
Edit Remove	Field Update	Update Status to Confirmed

Final Rejection Actions

Add Existing

Add New

Action	Type	Description
Edit Remove	Record Lock	Unlock the record for editing
Edit Remove	Field Update	Rejected

Recall Actions

Add Existing

Add New

Action	Type	Description
Edit Remove	Record Lock	Unlock the record for editing

5. Flow Builder:

- **Purpose:** All active automation is implemented in Flow Builder. Created RecordTriggered Flows and a Scheduled-Triggered Flow.

low Setup:

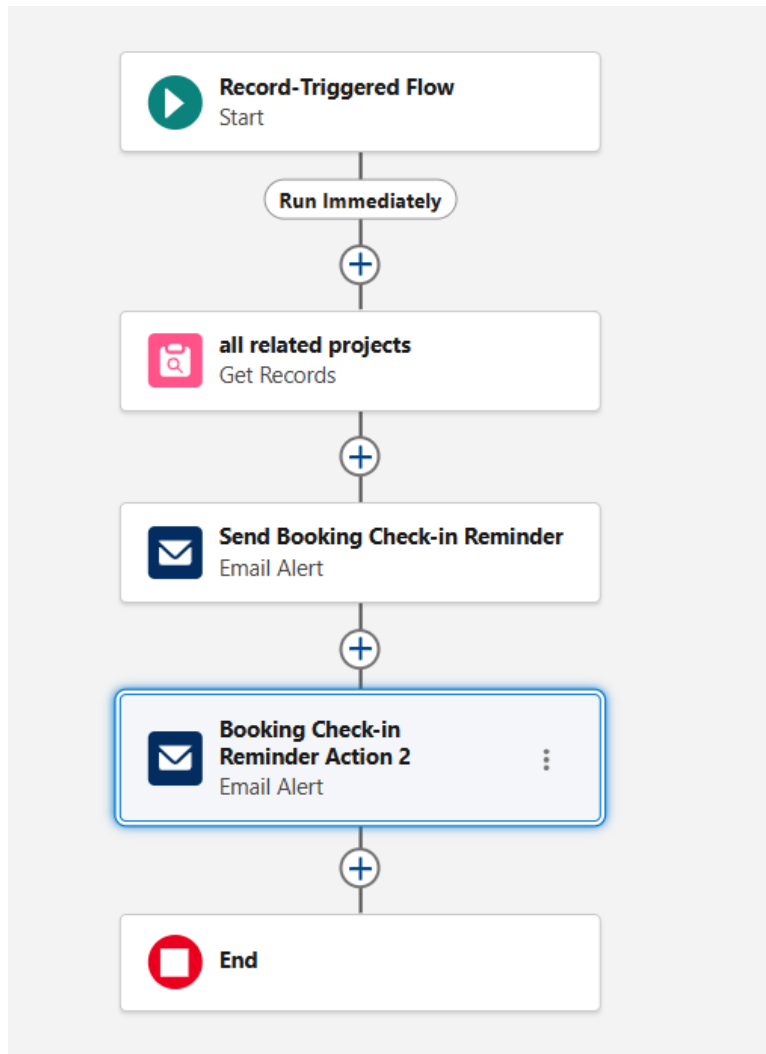
- Type: Scheduled-Triggered Flow
- Schedule: Daily at 7:00 AM
- Object: Booking__c
- Condition: Checkin_Date__c = TODAY() AND Status__c = Confirmed

Actions:

1. Email Alert → Template: Check-in Today Reminder → Recipient: Guest__r.Email
2. Optional Task → Subject: “Confirm Check-in for Today” → Owner: Reception / Booking Analyst → Related To: Booking__c → ActivityDate: TODAY()

Email Alert Setup:

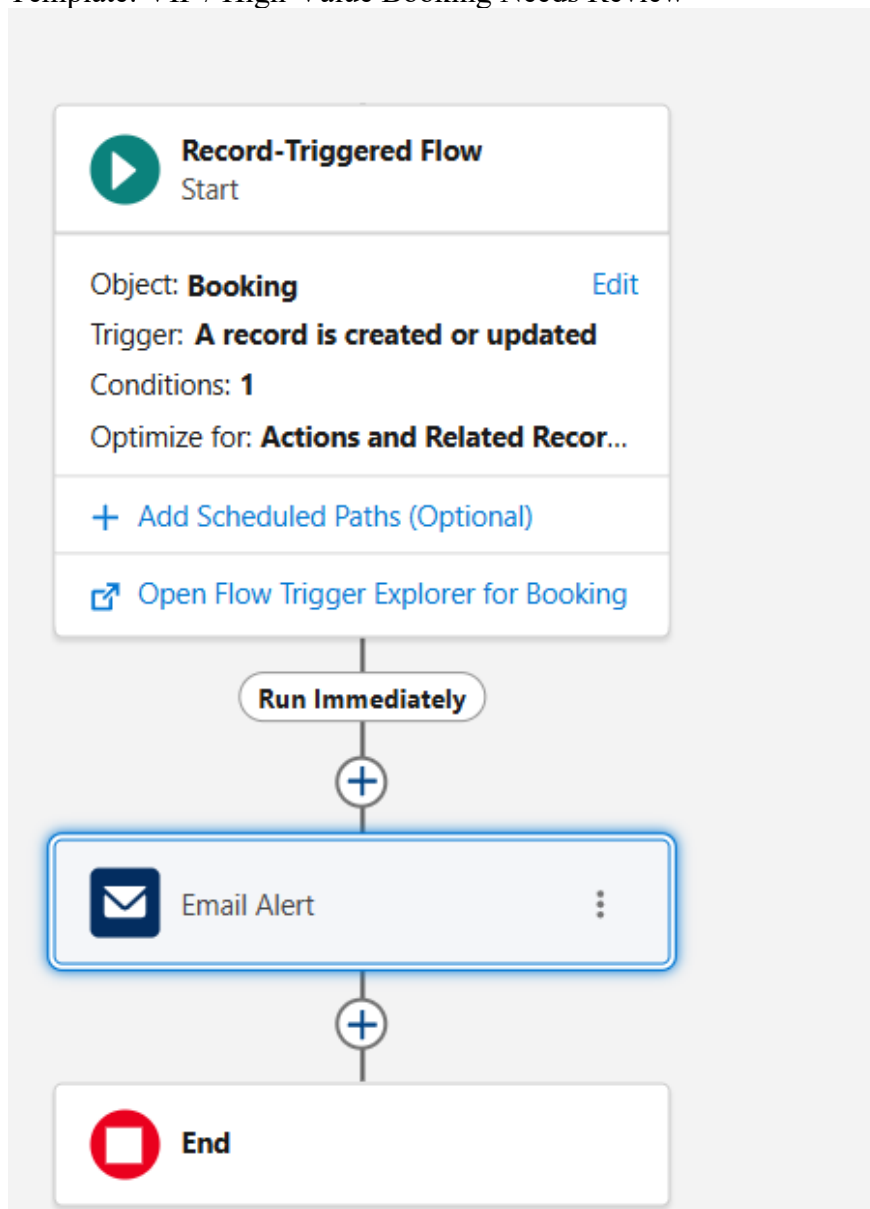
Field Value
Name Checkin_Today_Notification
Object Booking__c
Template Check-in Today Reminder

**Flow B — IP_or_High_Value_Booking_Review_Flow (Record-Triggered Flow)**

Object: Booking__c

- Trigger: When a record is created or updated
- Entry Condition: VIP__c = TRUE OR Booking_Amount__c > 100000
-
- Immediate Actions
- Update Records
- Target Records: The booking record that triggered the flow (\$Record)
- Field to Update: Status__c → "Needs Manager Review"
- Action (Email Alert)
- Email Alert Name: VIP_HighValue_Booking_Alert

- Recipient: Booking Manager (User or Role)
- Template: VIP / High-Value Booking Needs Review

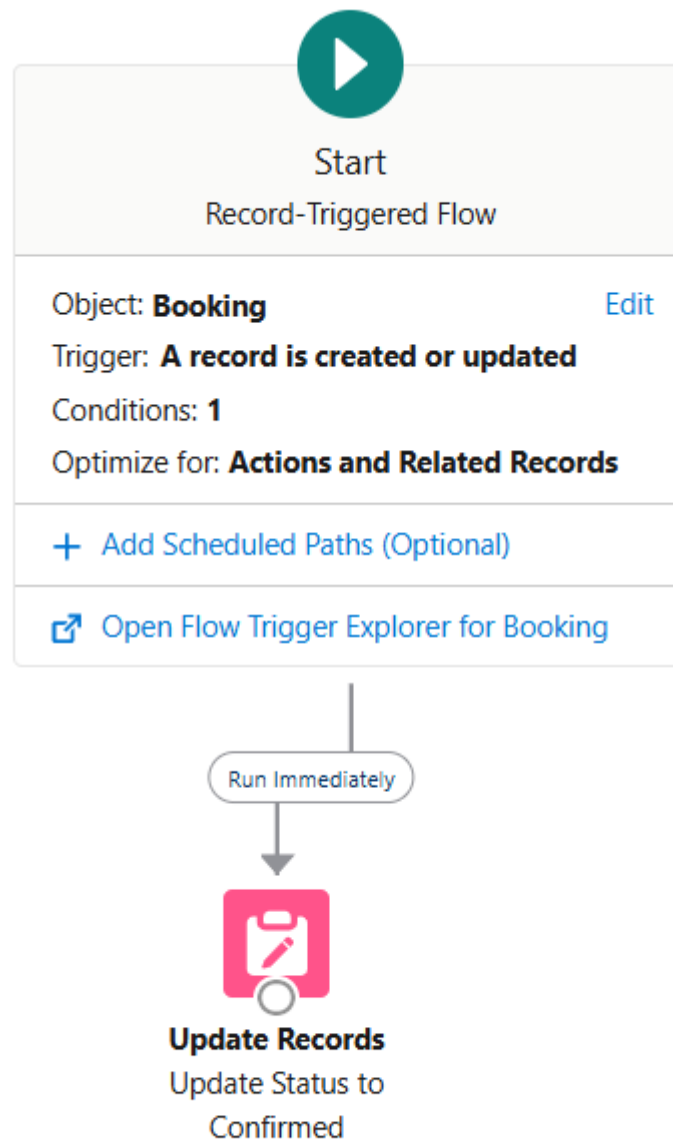


Flow C — VIP_or_High_Value_Booking_Flow (Scheduled-Triggered Flow)

- Object: Booking__c
- Trigger: When a record is created or updated
- Entry Condition: VIP__c = TRUE OR Booking_Amount__c > 100000

Immediate Actions

1. Update Records
 - Target Records: The booking record that triggered the flow (\$Record)
 - Field to Update: Status__c → "Confirmed"
2. Action (Email Alert)
 - Email Alert Name: VIP_HighValue_Booking_Confirmation
 - Recipient: Booking Manager or Guest (based on your design)
 - Template: Booking Confirmation for VIP / High-Value Booking



6. Email Alerts

- **Purpose:** Reusable email-alert records (with templates) are easiest to call from Flows/Approval processes.

Email alerts created (examples and recipients)

- Booking Check-in Reminder to Guest →
Object: Booking__c →
Template: Booking Check-in Reminder →
Recipients: Guest (Guest__r.Email)
- Optional Manager Reminder →
Object: Booking__c →

Template: VIP / High-Value Booking Check-in →
Recipients: Booking Manager (User or Role)

Setup Home Object Manager

Q Email Alerts

Process Automation Workflow Actions Email Alerts

Didn't find what you're looking for? Try using Global Search.

SETUP Email Alerts

Email Alert Booking Check-in Reminder

Rules Using This Email Alert Approval Processes Using This Email Alert Entitlement Processes Using This Email Alert

Email Alert Detail

Description Booking Check-in Reminder

Unique Name Booking_Check_in_Reminder

From Email Address Current User's email address

Recipients Booking Owner

Additional Emails

Created By Shaik Yasmin 9/24/2025, 7:01 PM

Modified By Shaik Yasmin 9/24/2025, 7:01 PM

Email Template Booking_Check_in_Reminder_v2

Object Booking

Rules Using This Email Alert

This alert is currently not used by any rules

Approval Processes Using This Email Alert

This alert is currently not used by any approval processes

Entitlement Processes Using This Email Alert

This alert is currently not used by any entitlement processes

Flows Using This Email Alert

Flow Name	Version	Description	Object	Active
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Reusable alerts called from Flows

SETUP Email Alerts

All Email Alerts

Email alerts are used to send emails from a flow or other automation.

View: All Email Alerts Create New View

Action	Description	Email Template Name	Object	Last Modified Date
Edit Del	Booking Approval Notification - Notify submitter when approved	Booking Confirmation Template	Booking	9/25/2025
Edit Del	Booking Check-in Reminder	Booking_Check_in_Reminder_v2	Booking	9/24/2025
Edit Del	Booking Email Alert	Booking Check-in Reminder	Booking	9/24/2025
Edit Del	Notify Booking Owner on Approval	Booking Confirmation Template	Booking	9/25/2025

7.Field Updates:

Purpose: Automatically update booking status or flags.

Examples implemented

- ☐ In Flows:
 - Update Status__c to Confirmed for VIP or High-Value Booking
 - Update Status__c to Checked-In on guest check-in
- ☐ In Approval Process:
 - Final Approval action sets Status__c = Approved
 - Final Rejection action sets Status__c = Rejected

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SETUP

Field Updates

All Workflow Field Updates

Help for this Page

Field updates allow you to automatically change a field value to one that you specify. Field updates are actions associated with workflow rules and approval processes.

View:

All Workflow Field Updates

Edit

Create New View

		New Field Update				
Action	Name	Field to Update	Operation	Value	Last Modified Date	
<div>Edit Del</div>	Changes the case priority to high.	Case: Priority	Value	High	7/20/2025	
<div>Edit Del</div>	First update	Account: Account Source	Value	Web	8/12/2025	
<div>Edit Del</div>	Rejected	Booking: Status	Value	Approved	9/25/2025	
<div>Edit Del</div>	Set Status to Approved	Booking: Status	Value	Approved	9/25/2025	
<div>Edit Del</div>	Update Status to Confirmed	Booking: Status	Value	Rejected	9/25/2025	

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

8. Tasks:

Purpose: Create follow-up work items for analysts and adjusters when human action is needed.

Examples implemented

- Scheduled Flow

Task Name	Trigger / Flow	Subject	Owner	Related To	Due Date
Check-in Follow-up	Check-in Today Notification Flow	“Confirm Check-in for Today”	Receptionist	Booking_c	TODAY()
VIP Booking Review	High_Value_Booking_Flag_Flow	“Review VIP / High-Value Booking”	Booking Manager	Booking_c	TODAY() + 1
Missing Info Follow-up	Flow / Scheduled Flow	“Collect Missing Booking Details”	Receptionist	Booking_c	TODAY() + 1

SETUP

Tasks

Task: Booking Approved – Follow Up

Help for this Page

Workflow Task Detail

Rules Using This Task (0) | Approval Processes Using This Task (1) | Entitlement Processes Using This Task (0)

Object: Booking

Assigned To: User: ListelOwnerAdmin

Subject: Booking Approved - Follow Up

Unique Name: Booking_Approved_Follow_Up

Due Date: Booking: Check in Date

Comments: This booking has been approved. Please check details and proceed with guest arrangements.

Created By: Shaik Yasmin: 9/25/2025, 10:48 AM

Status: Not Started

Priority: Normal

Modified By: Shaik Yasmin: 9/25/2025, 10:48 AM

Rules Using This Task

This task is currently not used by any rules.

Approval Processes Using This Task

Approval Processes Using This Task Help

Action	Approval Process Name	Description	Type	Status
<div>Edit Del</div>	Status Submitted		Booking	Active

Entitlement Processes Using This Task

This task is currently not used by any entitlement processes.

Back to top

Always show me more records per related list

