

Guest360 CRM Project – Phase 4: Process Automation (Admin)

This document explains Phase 4 (Process Automation) of the Guest360 CRM Project. It includes detailed click-by-click steps and screenshot placeholders for each automation configuration.

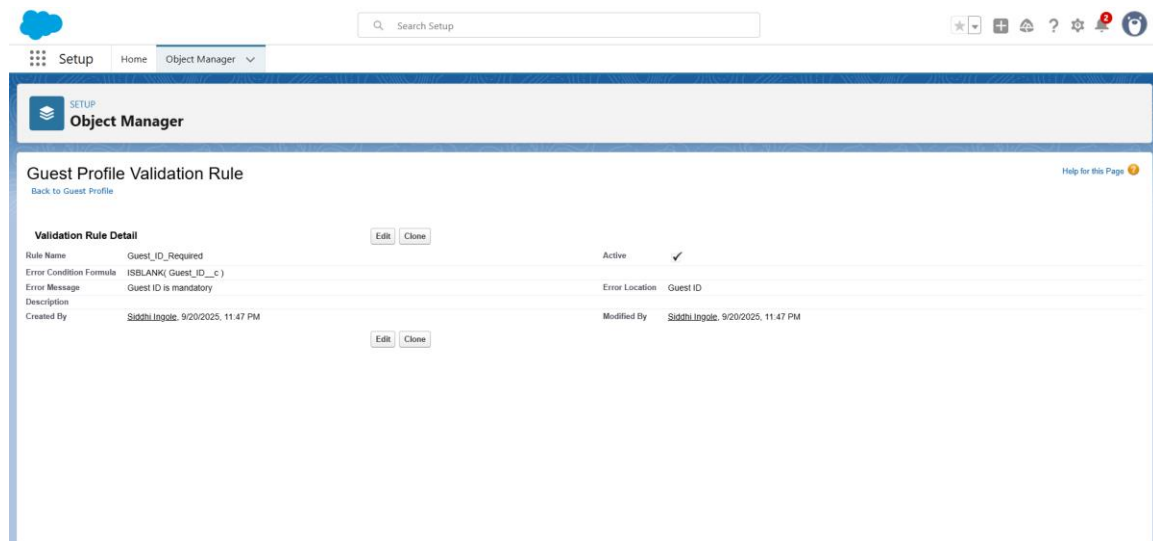
Step 1: Validation Rule – Mandatory Guest ID

Path: **Setup** → **Object Manager** → **Guest Profile** → **Validation Rules** → **New**

Steps:

1. Setup → Object Manager → Guest Profile.
2. Click Validation Rules → New.
3. Rule Name: Guest_ID_Required.
4. Error Condition Formula: ISBLANK(Guest_ID__c).
5. Error Message: Guest ID is mandatory.
6. Error Location: Field = Guest ID.
7. Save.

Now users cannot save Guest Profiles without Guest ID.



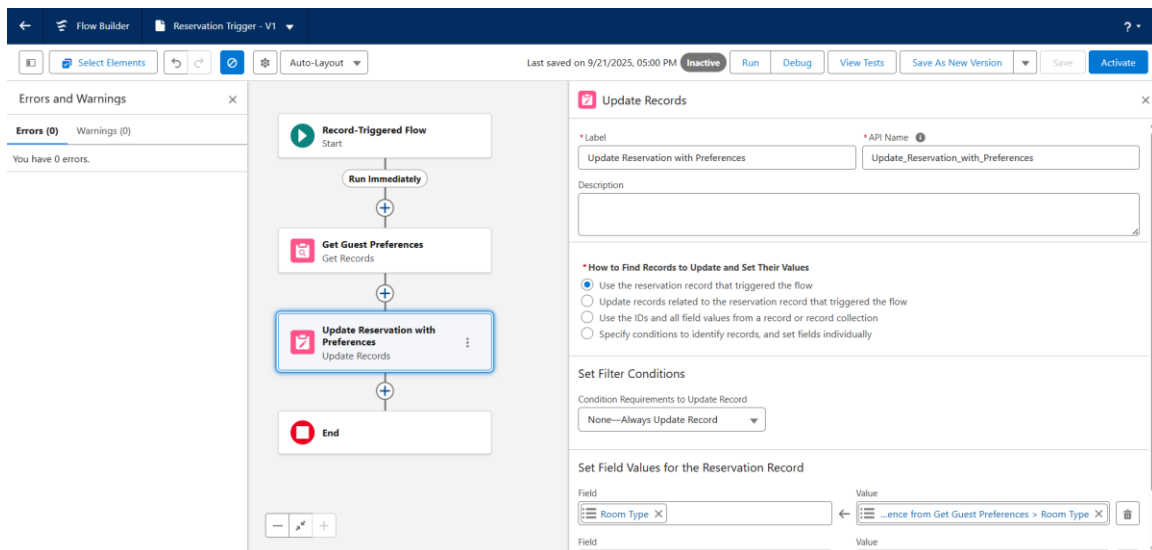
Step 2: Flow – Auto-Suggest Preferences for Repeat Guests

Path: **Setup** → **Flows** → **New Flow** → **Record-Triggered Flow**

Steps:

1. Setup → Flows → New Flow → Record-Triggered Flow.
2. Configure Start:
 - Object: Reservation
 - Trigger: When record is created

- Optimize: Actions & Related Records (After Save).
3. Add Get Records element:
 - Label: Get Guest Preferences
 - Object: Preferences
 - Filter: Guest Equals \$Record.Guest__c
 - Store: Only first record, all fields.
 4. Add Update Records element:
 - Label: Update Reservation with Preferences
 - Object: Reservation
 - Filter: Id Equals \$Record.Id
 - Set Field Values:
 - Room_Type__c = {!Get_Guest_Preferences.Room_Type__c}
 - Meal_Choice__c = {!Get_Guest_Preferences.Meal_Choice__c}
 5. Connect elements.
 6. Save Flow as Suggest Guest Preferences → Activate.

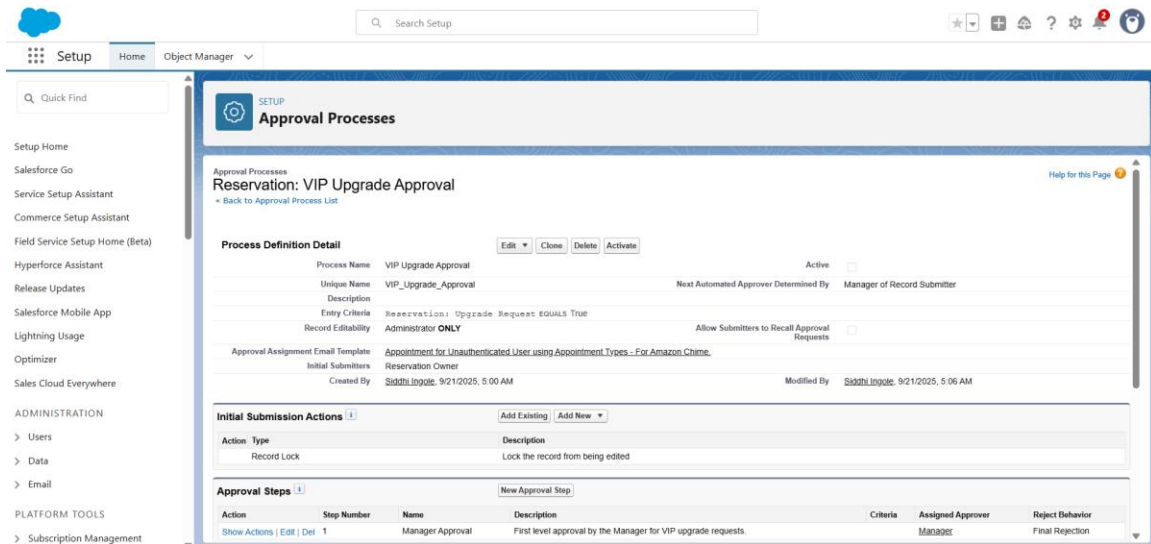


Step 3: Approval Process – Upgrades

Path: **Setup → Approval Processes → Reservation**

Steps:

1. Setup → Approval Processes → Select Reservation Object.
2. Click Create New Approval Process → Use Standard Setup Wizard.
3. Name: VIP Upgrade Approval.
4. Entry Criteria: Reservation.Upgrade_Request__c = TRUE.
5. Approver: Manager (or Role).
6. Final Actions:
 - Approved: Set Upgrade_Approved__c = TRUE
 - Rejected: Set Upgrade_Approved__c = FALSE
7. Save → Activate.



Step 4: Notifications – Personalized Alerts

Path: **Setup → Notification Builder → Notification Types**

Steps:

1. Setup → Notification Builder → Notification Types.
2. Click New → Label: VIP Guest Alert → Save.
3. Setup → Flows → New Flow → Record-Triggered Flow.
4. Start:
 - Object: Reservation
 - Trigger: Record is created/updated
 - Optimize: Actions & Related Records (After Save).
5. Add Decision element:
 - Label: Check VIP Guest
 - Outcome 1: VIP Guest (Condition: `$Record.Guest__r.VIP__c Equals TRUE`)
 - Default Outcome: Not VIP.
6. On VIP Guest path → Add Action → Send Custom Notification:
 - Label: Send VIP Notification
 - Notification Type: VIP_Guest_Alert
 - Notification Title: VIP Guest Check-In
 - Notification Body: VIP Guest `{!$Record.Guest__r.Name}` has checked in.
 - Recipient IDs: `$Record.OwnerId` (or Public Group).
 - Target ID: `$Record.Id`.
7. Save → Activate.

Conclusion

Phase 4 automates the Guest360 CRM system with validation rules, flows, approval processes, and custom notifications. These automations improve data quality, streamline processes, and ensure VIP guests receive personalized attention.