Phase 4 – Process Automation (Admin)

#. Introduction

This phase introduces automation into DineTrack so that reservations, billing, and customer engagement happen without manual intervention. Using Validation Rules, Flows, Email Alerts, and Notifications, the system will ensure accuracy, prevent errors, and improve the dining experience.

#. Validation Rules:-

Purpose: To ensure data integrity by preventing wrong or duplicate entries.

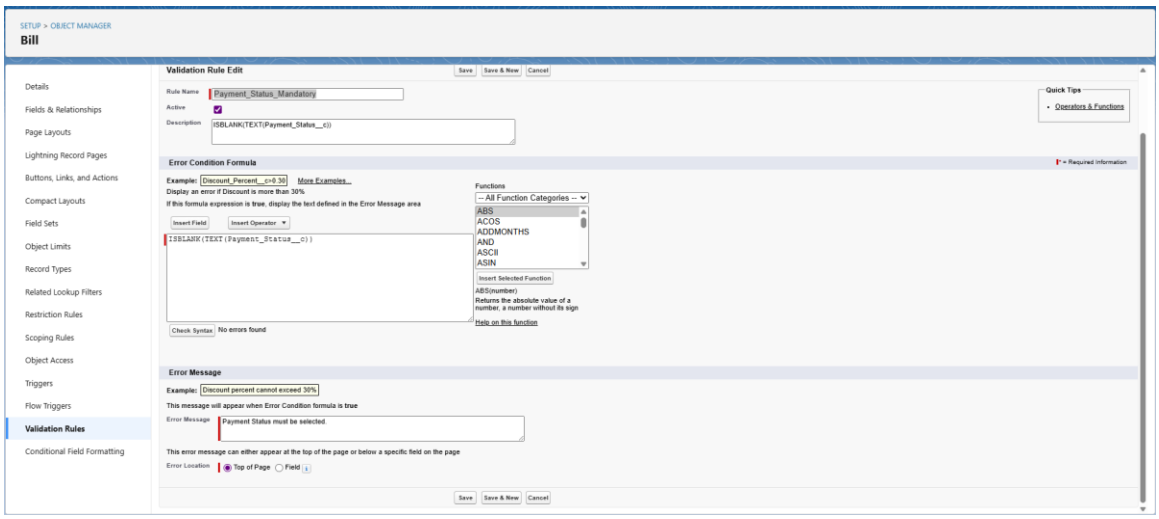
Examples:

1. **Duplicate Booking Prevention:** Ensures that a table cannot be reserved more than once for the same date and time. The formula used is:

```
AND(
  ISNEW(),
  ISPICKVAL(Status__c, "Confirmed"),
  NOT(ISBLANK(Table_Number__c)),
  NOT(ISBLANK(Date__c)),
  NOT(ISBLANK(Time__c))
)
```

If the criteria are met, an error message is displayed: *"This table is already booked for the selected time."*

2. **Mandatory Payment Status:** Ensures that whenever a Bill record is created, the *Payment Status* field cannot be left blank, enforcing proper billing and payment tracking.



Flows (Automation with Flow Builder)

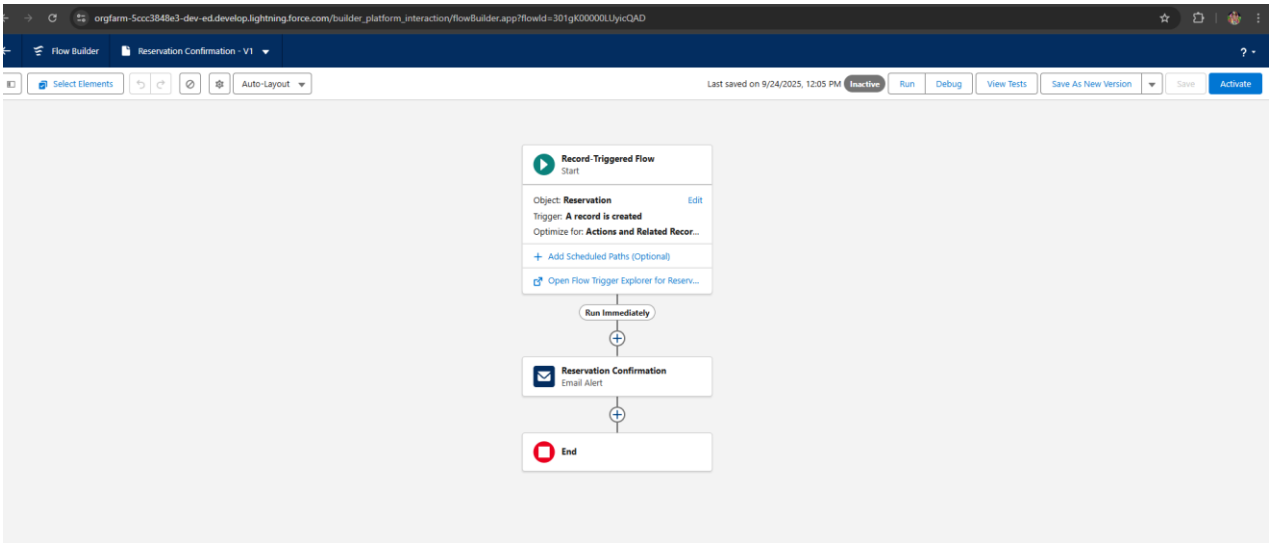
Automation & Notifications:

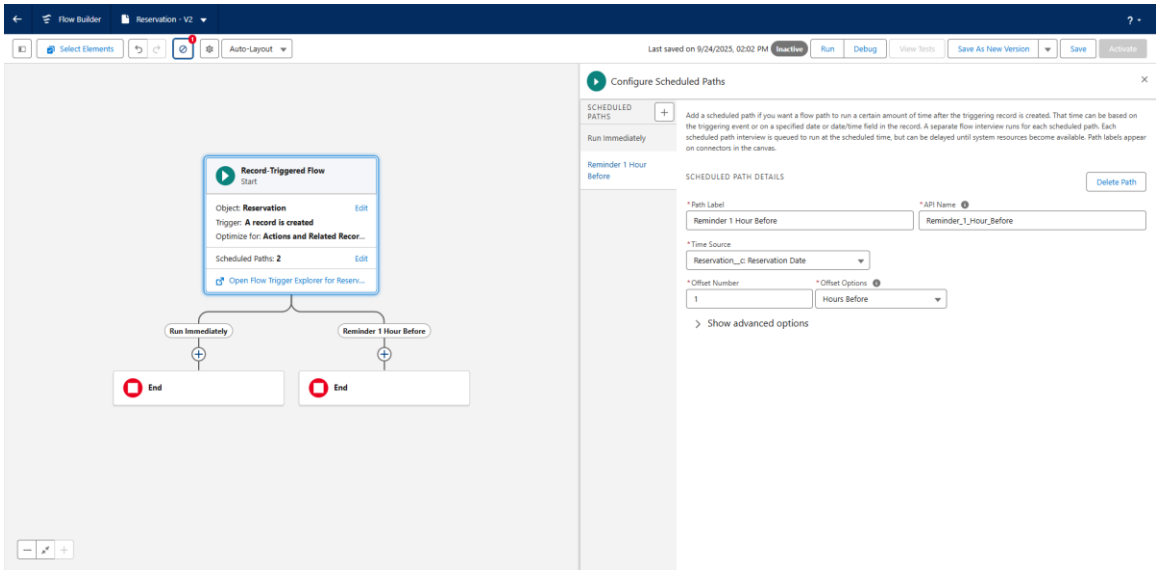
a) **Auto-Confirm Reservation:** A record-triggered flow on the Reservation__c object automatically sends a confirmation email or SMS to the customer whenever a new reservation is created.

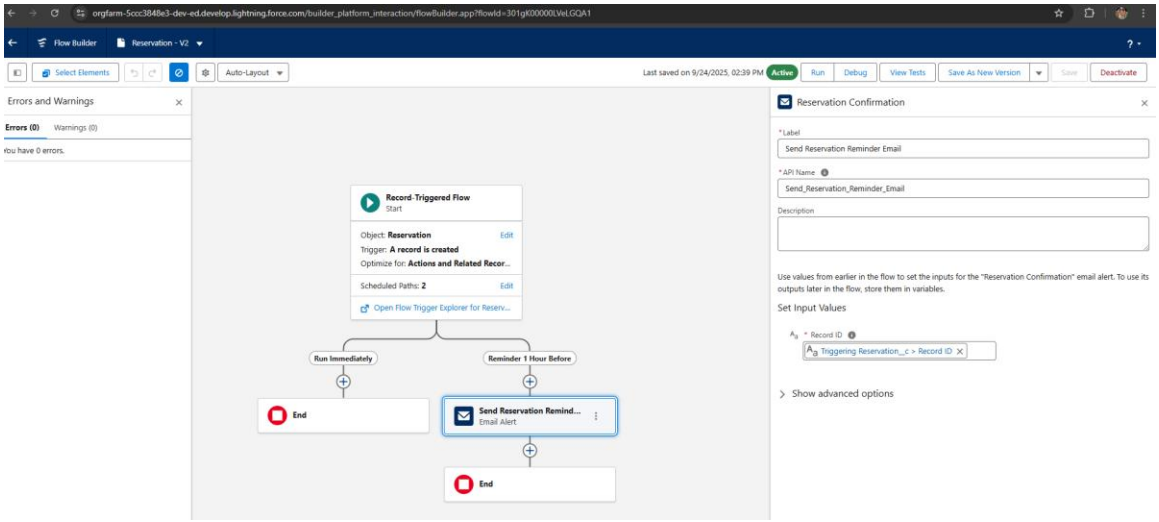
b) **Reminder Notification:** A scheduled flow triggers one hour before the reservation time to send a reminder to the customer via email or SMS.

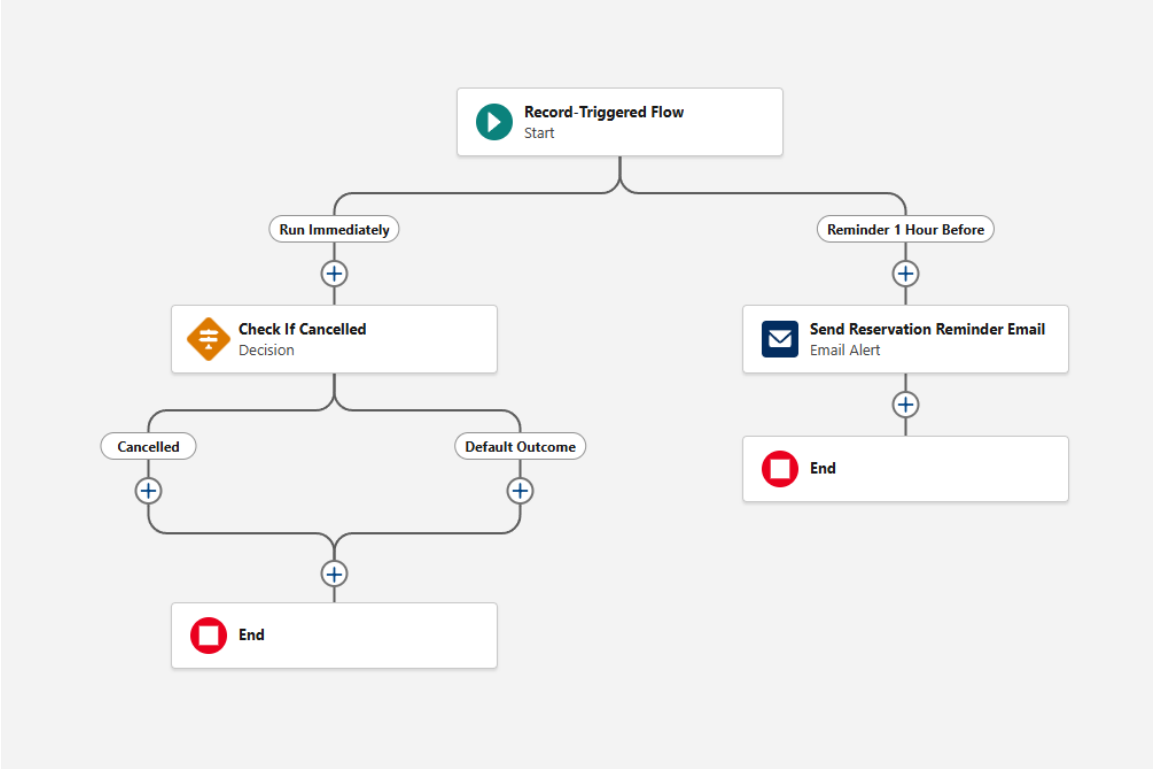
Email Alerts:

- **Booking Confirmation:** Sent to the customer immediately after a reservation is created.
- **Payment Receipt:** Sent to the customer once a Bill is marked as “Paid.”
- **Special Offers:** Sent as marketing alerts to loyal customers to promote engagement and repeat bookings.




Flow Builder
Reservation - V2
Select Elements
Auto-Layout
Last saved on 9/24/2025, 02:02 PM
Inactive
Run
Debug
View Tests
Save As New Version
Save
Activate
Record-Triggered Flow
Start
Object: Reservation
Edit
Trigger: A record is created
Optimize for: Actions and Related Recor...
Scheduled Paths: 2
Edit
Open Flow Trigger Explorer for Reserv...
Run Immediately
Reminder 1 Hour Before
End
End
Configure Scheduled Paths
SCHEDULED PATHS
Run Immediately
Reminder 1 Hour Before
Add a scheduled path if you want a flow path to run a certain amount of time after the triggering record is created. That time can be based on the triggering event or on a specified date or date/time field in the record. A separate flow interview runs for each scheduled path. Each scheduled path interview is queued to run at the scheduled time, but can be delayed until system resources become available. Path labels appear on connectors in the canvas.
SCHEDULED PATH DETAILS
Delete Path
*Path Label
Reminder 1 Hour Before
*API Name
Reminder_1_Hour_Before
*Time Source
Reservation__c Reservation Date
*Offset Number
1
*Offset Options
Hours Before
Show advanced options


orgfarm-5ccc384Be3-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowBuilder.app?flowId=301gK00000LVeLGQA1
Flow Builder
Reservation - V2
Select Elements
Auto-Layout
Last saved on 9/24/2025, 02:39 PM
Active
Run
Debug
View Tests
Save As New Version
Save
Deactivate
Errors and Warnings
Errors (0)
Warnings (0)
You have 0 errors.
Record-Triggered Flow
Start
Object: Reservation
Edit
Trigger: A record is created
Optimize for: Actions and Related Recor...
Scheduled Paths: 2
Edit
Open Flow Trigger Explorer for Reserv...
Run Immediately
Reminder 1 Hour Before
End
Send Reservation Remind...
Email Alert
End
Reservation Confirmation
*Label
Send Reservation Reminder Email
*API Name
Send_Reservation_Reminder_Email
Description
Use values from earlier in the flow to set the inputs for the "Reservation Confirmation" email alert. To use its outputs later in the flow, store them in variables.
Set Input Values
* Record ID
Triggering Reservation__c > Record ID
Show advanced options



#Phase 4 Conclusion

With Phase 4, DineTrack becomes smart and automated:

- No duplicate bookings.

- Automatic confirmations & reminders for customers.

- Managers instantly alerted to cancellations or high-value sales.

This ensures better accuracy, efficiency, and customer satisfaction in the restaurant's CRM operations.