CASE STUDY

StayOps Group CRM

A production-oriented Airtable operations hub for two fictional UK accommodation businesses.

Northstar Corporate Stays Ltd
Corporate accommodation and relocation: enquiry, options, provider sourcing, bookings, extensions and margin control.

Harbourlight Serviced Homes Ltd
Serviced accommodation and property management: reservations, guests, cleaning, maintenance, payouts and incidents.

23	5	7	1
linked tables	role interfaces	intake forms	controlled automation

Prototype boundary

All people, companies, properties, references and monetary values are synthetic. Uplisting, Xero, Stripe, email, storage and AI are represented by controlled queues and sample events; no live credentials, payments, refunds, invoices or messages are used.

Interactive demo — Open the read-only Executive Overview

Prepared 22 August 2026 · GBP · Europe/London design assumption

1. Problem and design response

The operator needs one reliable place to see who is staying where, which legal company owns each transaction, whether providers and documents are ready, what money is expected or missing, and which exceptions need human attention. The prototype makes those relationships explicit while keeping accounting and channel systems authoritative.

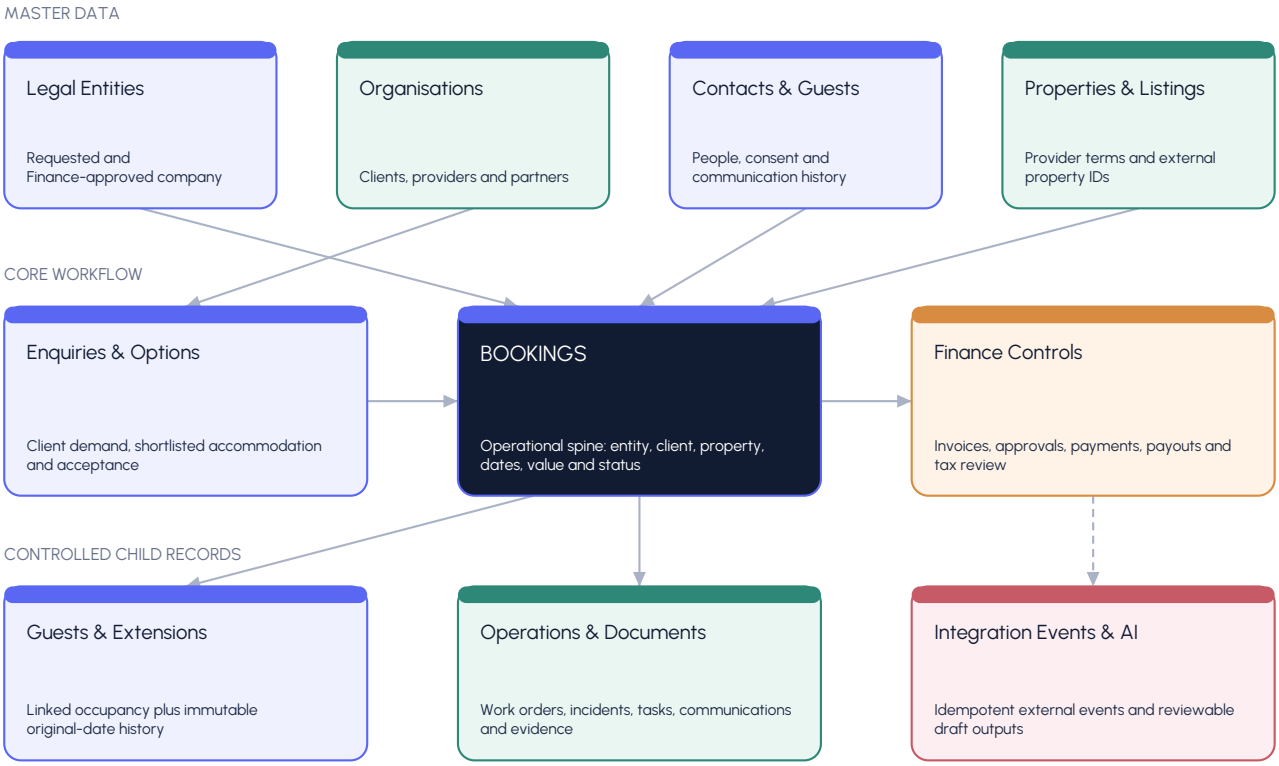
Operational challenge	Airtable response	Control
Two companies, shared management and group reporting	One relational base with a Legal Entity spine	Requested and Approved Legal Entity are separate
Corporate enquiries become multi-party stays	Enquiry → options → booking → guests → extension	Original dates remain immutable; current dates change only after approval
Reservations and property operations arrive from outside	Immutable source IDs and Integration Events	Duplicate replay is logged and ignored
Finance needs clean hand-offs, not hidden automation	Invoice readiness and mock Xero/Stripe queues	Draft/approval boundary; no automated money movement
Documents, incidents and consent are easy to miss	Expiry, overdue, exception and eligibility formulas	Human review remains mandatory

Success definition

- An operator can trace a client enquiry to an accepted property option, confirmed booking, guest, invoice and payment without duplicated master data.
- Finance can see why an invoice is ready or blocked, including a visible wrong-company mismatch.
- Management sees reconciled group metrics while Company A, Company B, Finance and Admin each get a focused workspace.

2. Relational architecture

The diagram shows how the base behaves, not merely how its 23 tables are grouped. Bookings form the operational spine: master records feed the booking, while finance, operations and integration history remain linked child records.



Relationship rules

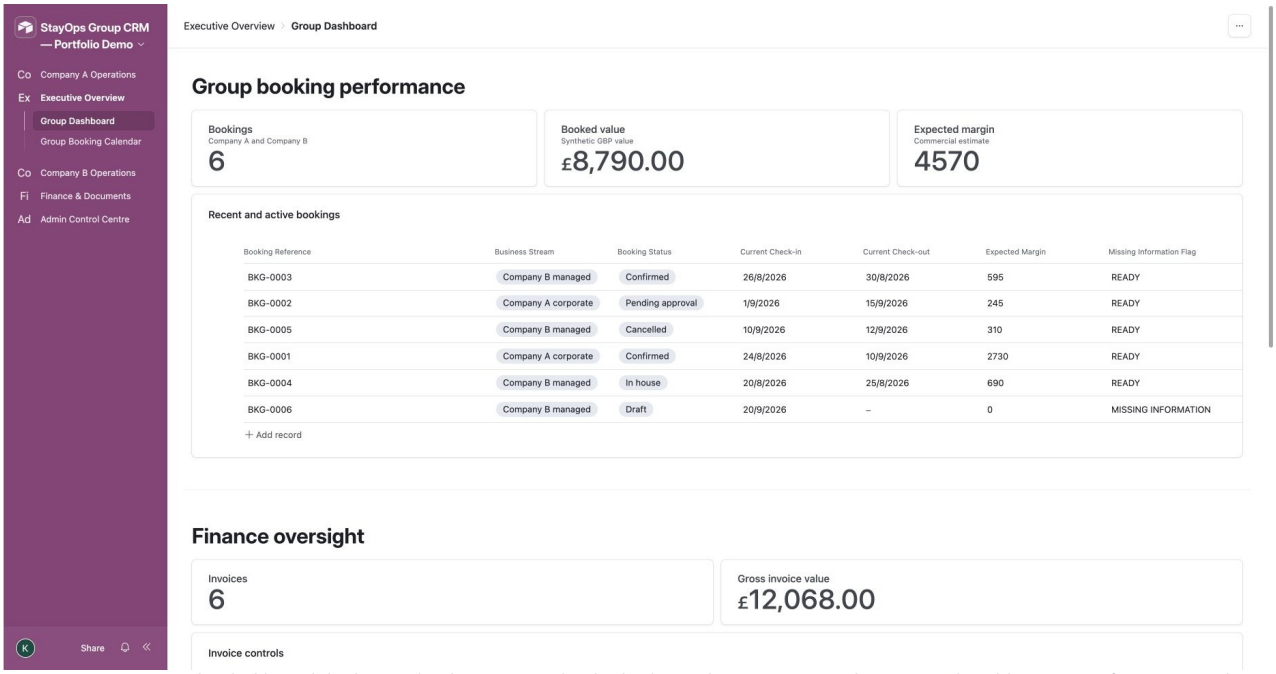
- Every transaction has a direct or inherited Legal Entity relationship; Finance separately controls the Approved Legal Entity used for invoice readiness.
- Bookings link the client, provider, property, guests, extensions, invoices and operational work without copying their master data.
- Original booking dates and external source identifiers remain immutable; changes are represented through linked history and idempotent Integration Events.

API-ready conventions

- Stable IDs: ORG-0001, PROP-0001, ENQ-0001, BKG-0001, INV-0001 and DOC-0001.
- Dedicated immutable fields for Uplisting reservation/property references, Xero invoice/organisation IDs, Stripe references, platform IDs and future website IDs.
- Integration Events retain source, external event ID, idempotency key, attempt number, outcome, payload summary and linked business record.

3. Executive and operational experience

Five role-oriented interfaces provide focused access without exposing every table to every user: Executive Overview, Company A Operations, Company B Operations, Finance & Documents and Admin Control Centre. Supporting pages add calendars, kanban boards and exception registers.



Executive Overview. The dashboard displays six bookings, £8,790 booked value and £4,570 expected margin, with visible missing-information and low-margin cases.

Company A

Enquiry kanban, options, provider/property sourcing, bookings, extension approvals and margin warnings.

Company B

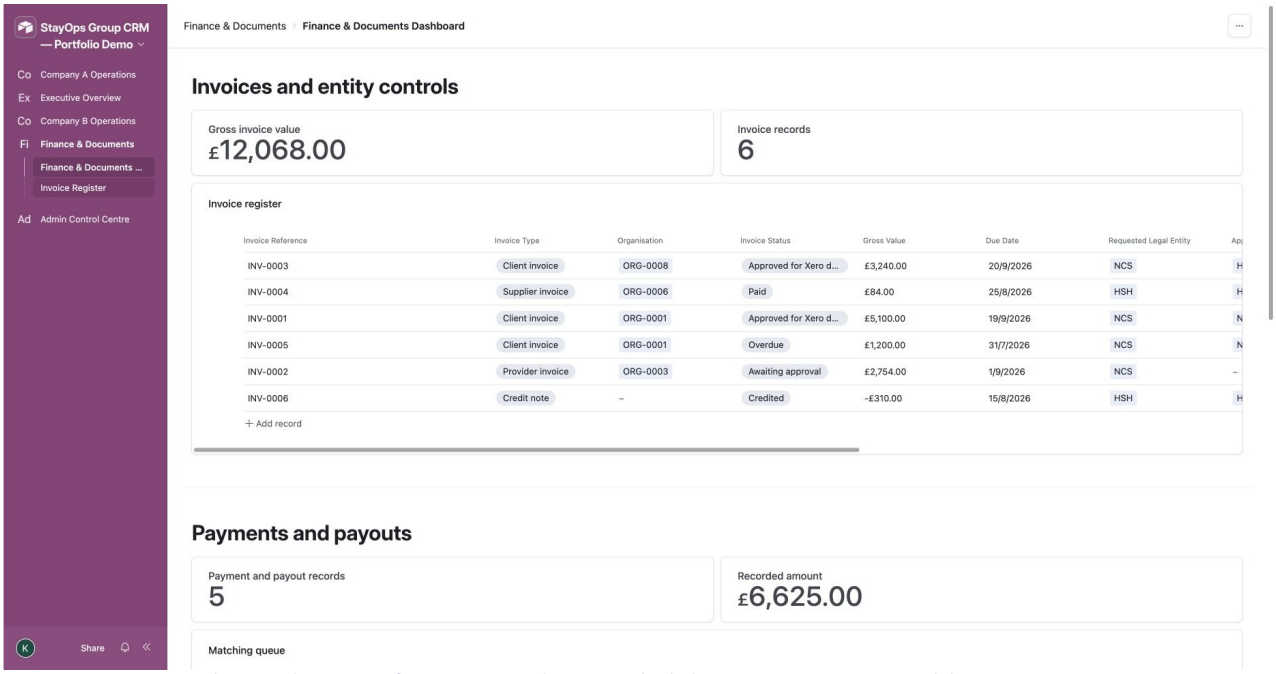
Reservation calendar, properties, guests, cleaning, maintenance, incidents, payouts and eligible previous guests.

Admin

Incomplete records, duplicate warnings, overdue tasks, compliance expiry, integration failures and AI drafts.

4. Finance, entity and document controls

Operational users request a legal entity; Finance approves it. Invoice formulas then expose readiness, rather than silently moving money or creating an accounting transaction.



Finance & Documents. The control register surfaces invoice readiness, overdue balances, accounting status and document exceptions.

Scenario	Observed control
INV-0001	Approved entity matches booking/client → QUEUE XERO DRAFT
INV-0002	Approved entity missing → BLOCKED: APPROVAL REQUIRED
INV-0003	Approved entity conflicts → BLOCKED: ENTITY MISMATCH
INV-0005	Past due and unpaid → visible overdue exception

5. Demonstrated end-to-end workflows

Corporate enquiry to booking

ENQ-0001 links to several Accommodation Options; the accepted option produces BKG-0001 with client, provider, property and commercial values inherited by relationship.

Controlled extension

BKG-0001 retains original checkout 7 Sep 2026. Approved EXT-0001 updates only current checkout to 10 Sep 2026. Result: 17 nights and £2,730 expected margin.

Company B reservation operations

Uplisting-style reservations match properties by source property reference. Company B bookings feed arrival/departure workload and linked cleaning work orders without writing to live availability.

Idempotent integration events

EVT-0001 succeeds; replay EVT-0002 carries the same external event/idempotency key and is marked Duplicate ignored, preserving history without a duplicate reservation.

Stripe review queue

Matched, unmatched, failed, disputed and refunded examples are represented in Payments & Payouts and Integration Events. Nothing refunds or captures funds.

Consent and repeat guest outreach

Eligibility requires permission, source, date and channel, with no opt-out/suppression. Opted-out or unknown guests calculate DO NOT CONTACT.

Documents and compliance

External-storage URLs and attachment metadata form a searchable register. Expired and due-soon records surface in Admin and link to follow-up tasks.

AI as draft assistance

AI Requests cover search, summarise, extract, classify and draft. Output status remains Draft for human review; AI never decides tax or entity assignment.

Controlled automation boundary

A native Airtable automation named MOCK — Approved Invoice to Xero Queue is configured to watch only finance-cleared invoices and prepare a linked Integration Event. Production activation is gated by sandbox credentials, reconciliation testing and user acceptance testing, preventing duplicate jobs or an uncontrolled accounting connection.

6. Acceptance evidence

Result	Test	Evidence
PASS	Enquiry → option → booking	BKG-0001 links the accepted option, client, provider and property; formulas reconcile nights and margin.
PASS	Extension history	Original dates remain unchanged; only current checkout reflects approved extension.
PASS	Wrong-company block	INV-0003 reports BLOCKED: ENTITY MISMATCH.
PASS	Missing approval block	INV-0002 reports BLOCKED: APPROVAL REQUIRED.
PASS	Uplisting replay	Second event with same idempotency key is Duplicate ignored.
PASS	Reservation cancellation/update	Existing booking state and event history are both represented.
PASS	Cleaning workload	Company B reservations link to arrival/departure and cleaning work orders.
PASS	Payment exceptions	Successful, overdue, unmatched, failed, refunded and credited examples exist.
PASS	Marketing suppression	Opted-out/unknown contacts calculate DO NOT CONTACT.
PASS	Document expiry	Expired and due-soon provider/property evidence is surfaced.
PASS	Dashboard reconciliation	Executive cards read six bookings, £8,790 booked value and £4,570 expected margin from source records.
PASS	Synthetic data	No secrets, real contact data or card data are stored.

Validation status

Interface access, forms and field-level permissions require named-user role testing before production release. The native automation remains disabled until sandbox testing, reconciliation and user acceptance testing are complete.

7. Permissions, limits and roadmap

Role	Primary access	Restricted actions
Admin	Schema, integrations, exceptions, tasks and compliance	Production credentials remain outside Airtable
Finance	Approvals, approved entity, tax review, invoices, payments and documents	No payment/refund/bank-detail automation
Company A	Enquiries, options, bookings, providers, properties and extensions	Cannot approve entity or accounting classification
Company B	Reservations, guests, cleaning, maintenance, incidents and payouts	No live availability write-back
Management	Group KPIs, exceptions and approvals	Read/review focus

Prototype limitations

- No live Uplisting, Xero, Stripe, email, storage or AI credentials; only Airtable-side contracts, logs and examples are implemented.
- Interface access, forms and record-level role isolation require named-user testing before production release.
- Tax classifications are synthetic accountant-review examples, not tax advice. Retention, lawful basis and data-processing agreements require discovery.
- The native automation remains disabled pending sandbox credentials, reconciliation testing and UAT.

Production roadmap

1 · Discover	2 · Govern	3 · Integrate	4 · Prove
Field mapping, ownership, SLAs, migration and duplicate rules	GDPR, retention, permissions, accounting and incident policy	Sandboxes, webhooks, idempotency, secrets and observability	Migration rehearsal, permission tests, reconciliation, UAT and sign-off

The prototype is deliberately production-oriented: relational master data, immutable external identifiers, explicit approval boundaries, visible exception queues and human-review controls. Its value is not hidden automation; it is safe operational clarity.