

4. Project Design Phase

The Project Design Phase laid the technical and functional blueprint for the banquet hall CRM system, ensuring it addressed real user needs while remaining scalable and aligned with Salesforce best practices. It transformed validated pain points into structured objects, flows, and business rules. This phase guided decisions around data relationships, automation logic, and UI components, bridging the gap between user insights and a buildable, maintainable solution.

4.1 Problem–Solution Fit:

Problem Recap:

- Current processes are manual or scattered across spreadsheets and calls, leading to inefficiencies
- Frequent data entry errors and duplicated customer or event information
- Lack of real-time visibility for managers into hall availability, staff assignments, or upcoming events
- Poor coordination in assigning vendors and staff, resulting in last-minute issues
- Challenges in tracking payments, generating post-event reports, and analyzing booking trends
- Banquet hall operations demand real-time coordination across bookings, venues, vendors, and payments

Does the Proposed Solution Fit?

Yes. The Salesforce CRM solution:

- Introduces object-level control for **Bookings, Venues, Customers, Vendors, and Payments**
- Enables automated **service pricing and availability checks** through Flows
- Validates **vendor assignments and booking conflicts** using Apex Triggers
- Summarizes operational performance using **Reports and Dashboards**
- Uses **formula fields** to dynamically calculate charges and event costs

- Creates **centralized scheduling and coordination views** using Lightning App Builder

Thus, it directly addresses the operational pain points of managing banquet hall bookings and event logistics in a unified, scalable, and efficient manner.



PROS

Centralized Booking Management

All bookings, customer details, and vendor assignments are stored in one place—reducing errors and improving coordination

Automation of Routine Tasks

Flows and triggers can automate confirmations, reminders, and payment alerts, saving time and reducing manual toke-ups.

Customizable to Business Needs

Salesforce allows you to tailor objects, fields, and logic to mach your specific banquet operations and workflows



CONS

High Initial Setup Cost

Customizing Salesforce for banquet operations may require developer time and licensing costs.

Learning Curve

Staff may need taining to navigate the Lightning interface and understand CRM workflows.

Overhead for Small Venues

For smaller banquet halls w/ilimited bookings, the system might feel too complex or underutilized

Ongoing Maintenance

Custom hows, triggers, and reports need periodic updates to stay aligned with business changes

4.2 **Proposed Solution:**

Our proposed CRM application is designed to digitize and streamline banquet hall booking operations using Salesforce's powerful customization capabilities.

Key Functional Features:

- **Custom Objects:**

- Venue, Booking, Customer, Vendor, Event Details, and Payment

- **Automation & Validation:**

- Vendor assignment checks (e.g. caterers, decorators) using Apex Triggers
- Total cost calculation automation using Flows based on services and duration
- Input validation for booking conflicts, missing information, or overbooking

- **Formula Fields for Efficiency:**

- Event Duration = End Time – Start Time
- Total Event Cost = Base Venue Fee + Vendor Charges – Discounts
- Auto-lookup of assigned Vendor Names and Customer Contact Info

- **UI & Navigation:**

- Banquet Booking App built using Lightning App Builder
- Tabs for each custom object and user-tailored page layouts for staff, managers, and vendors

- **Reports and Dashboards:**

- Booking Summary Reports by date, type, or customer
- Vendor Assignment Dashboards showing service load and availability
- Monthly Revenue and Event Frequency Tracking Dashboards

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Banquet Hall Booking

Banquet HallsBillingsStaffsReportsDashboards

Dashboard

Total Revenue

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Banquet Halls with Billings Report

Sum of Total Amount

Booking Date

10/22/2025

\$50k

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View Report (Banquet Halls with Billings ...)

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4.3 Solution Architecture:

Object Relationship Overview

Object	Key Fields / Features
Venue	Name, Location, Capacity Availability
Booking	Linked to Venue, Start Date, End Date, Status
Customer	Name, Email, Phone, Address
Vendor	Name, Service (Picklist), Phone, Email
Event Details	Linked to Customer and Vendor Number of Guests Setup Details Formula

Lookups:

- Staff Member → Venue
- Booking → Venue, Customer, Event Coordinator, Vendor Package
- Vendor Package → Vendor

Formulas:

- IF(Customer_Name__r.Archestra__c = TRUE, 50000, 0)
- IF(Customer_Name__r.DJ__c = TRUE, 70000, 0)
- IF(Customer_Name__r.Magician__c , 15000, 0)
- IF(Customer_Name__r.Shenai_and_Mridangam__c = TRUE, 25000, 0)
- IF(Customer_Name__r.Kolatam__c , 15000, 0)
- CASE(Customer_Name__r.Food_Menu__c , 'Veg', 450, 'Special Veg', 550,

'Non-Veg', 550, 650)

- Food_Amount_per_Plate__c *
Customer_Name__r.No_of_Visitors__c
- CASE(Customer_Name__r.Decoration_Purpose__c , 'Marriage',
50000,
'Reception', 60000,
'Anniversary', 30000,
'Birthday', 25000 ,
'Other Events', 20000 , 0)
- Booking_Date__c <= TODAY()

Automation:

- Flows for service pricing logic
- Triggers for vendor assignment validation
- Reports & dashboards for operational insights

Summary:

The Project Design Phase ensured that our banquet hall CRM solution aligned closely with the needs of customers, staff, and managers while adhering to Salesforce best practices in object modeling, validation, automation, and UI design. It provided a structured foundation for booking workflows, vendor coordination, and event cost logic. This comprehensive design blueprint served as a critical guide for the upcoming build and configuration stages, ensuring clarity and scalability.