

6. Project Executable Files

This phase outlines the actual Salesforce configurations, data models, and outcomes implemented during the execution of the Banquet Hall Booking CRM application. It ensures that all key elements—custom objects, automation flows, validations, and reports—are clearly documented and aligned with real-world use cases. The components developed in this phase are designed to be traceable, reusable, and easily assessable for future improvements or audits. It captures the practical realization of booking flows, vendor assignment rules, and payment tracking modules, offering clarity, replication, and validation across the entire system lifecycle.

6.1 Project Files

Project Executable Files

The following project files were executed in the Salesforce Developer Org:

Milestone 1: Developer Account Setup

Milestone 2: Object Creation

Milestone 3: Tab Creation

Milestone 4: Lightning App Setup

Milestone 5: Field Creation

Milestone 6: Page Layouts

Milestone 7: Creation Of Record Types

Milestone 8: Validation Rules

Milestone 9: Flow Setup

Milestone 10: Apex Trigger

Milestone 11: Reports

Milestone 12: Dashboards

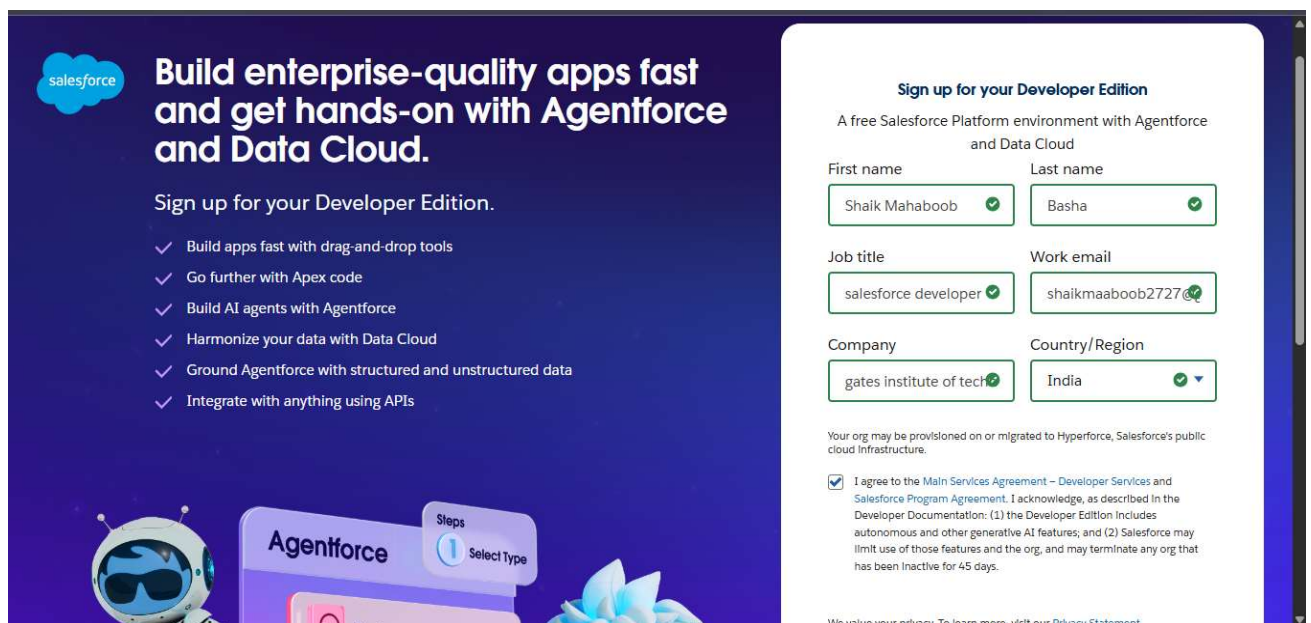
Milestone 13: Final Review

List of Milestone Tasks with Supporting Screenshots and Descriptions

Milestone 1: Developer Account Setup

- Created and activated a Salesforce Developer Org.
- Link: <https://developer.salesforce.com/signup>
- Setup the base environment for CRM development.
- Verified access to Object Manager, Flow Builder, and App Builder

OUTPUT SCREENSHOT



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First name: Shaik Mahaboob ✓ Last name: Basha ✓

Job title: salesforce developer ✓ Work email: shaikmaaboob2727@gmail.com ✓

Company: gates institute of tech ✓ Country/Region: India ✓

Your org may be provisioned on or migrated to Hyperforce, Salesforce's public cloud Infrastructure.

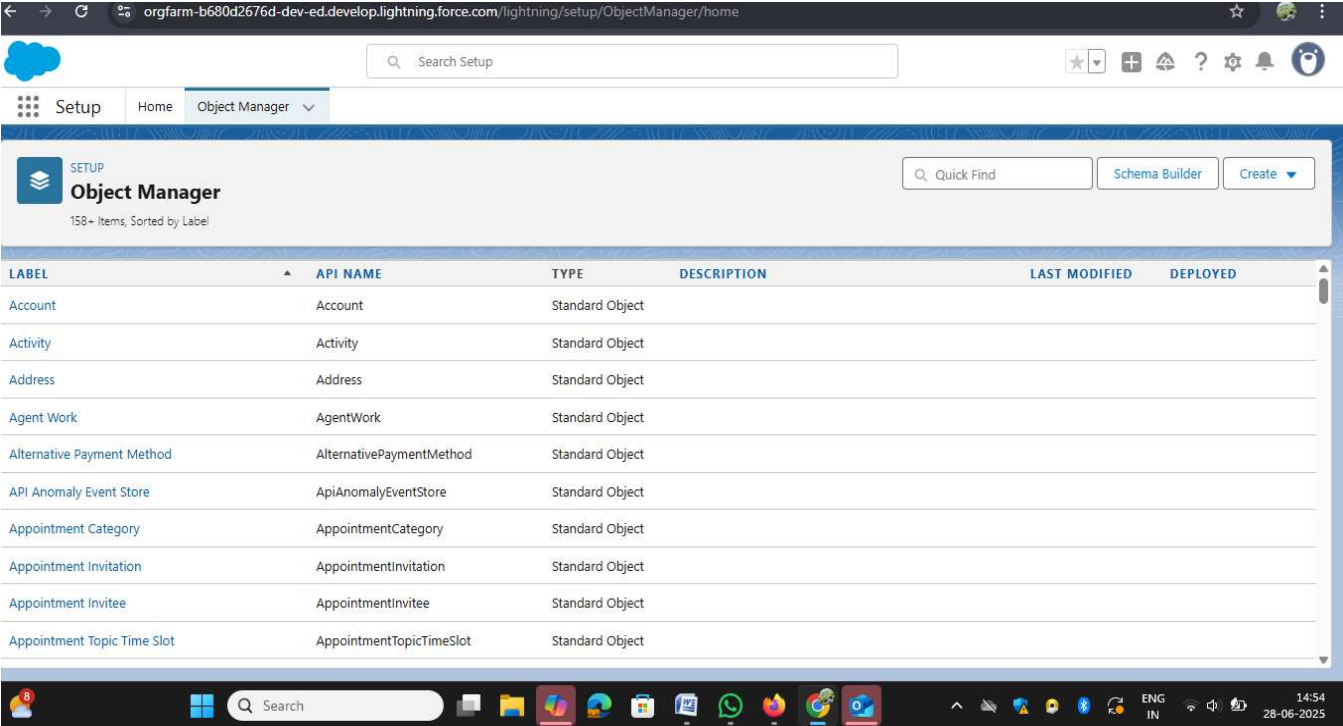
☒ I agree to the Main Services Agreement – Developer Services and Salesforce Program Agreement. I acknowledge, as described in the Developer Documentation: (1) the Developer Edition includes autonomous and other generative AI features; and (2) Salesforce may limit use of those features and the org, and may terminate any org that has been inactive for 45 days.

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Milestone 2: Object Creation

- Created 3 custom objects:
 - Banquet hall custom, Billing and Staff
- Established foundational schema for Banquet Hall Booking.
- Configured relationships using lookup fields.

OUTPUT SCREENSHOT



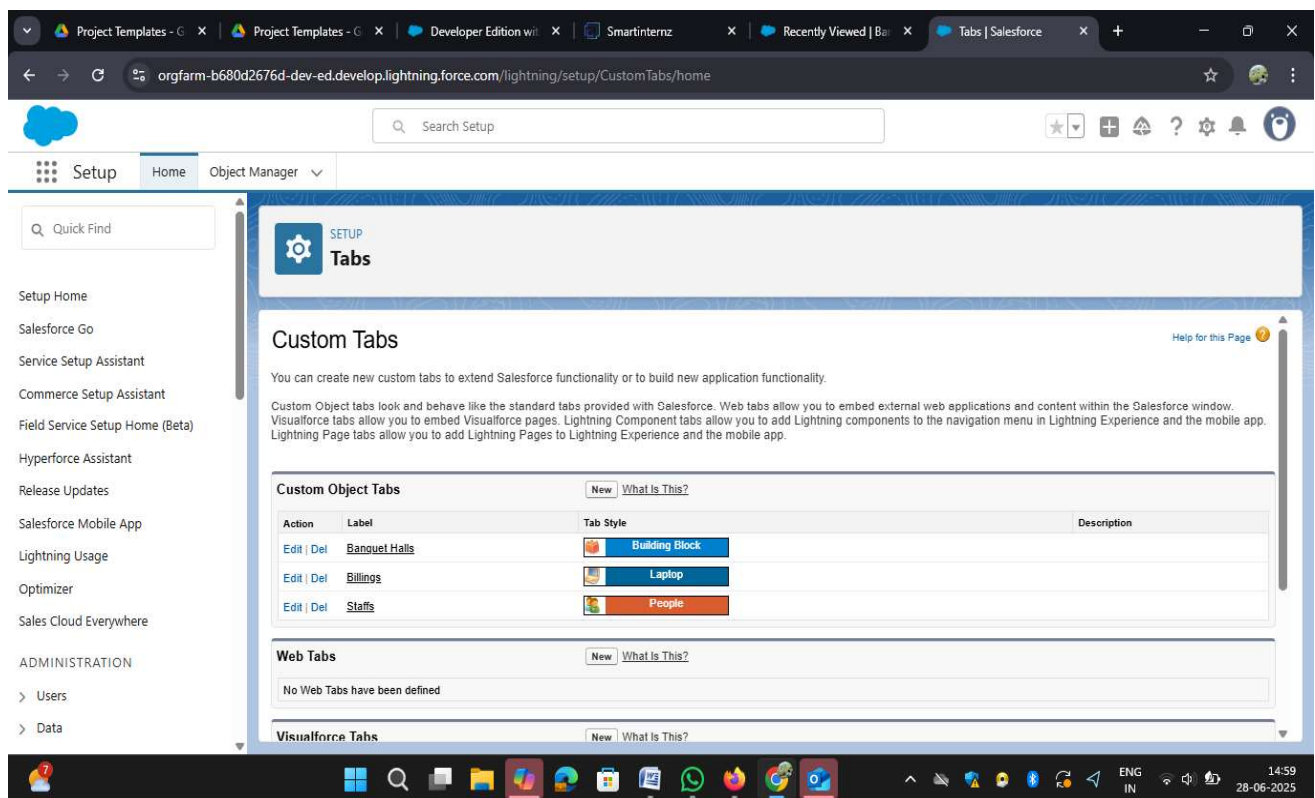
The screenshot displays the Salesforce Object Manager interface. The browser address bar shows the URL: `orgfarm-b680d2676d-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home`. The interface includes a search bar labeled "Search Setup" and a navigation menu with "Setup", "Home", and "Object Manager". The main header area shows the "Object Manager" title, a "Quick Find" search bar, and buttons for "Schema Builder" and "Create". Below the header, a table lists standard objects. The table has columns for LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The objects listed are Account, Activity, Address, Agent Work, Alternative Payment Method, API Anomaly Event Store, Appointment Category, Appointment Invitation, Appointment Invitee, and Appointment Topic Time Slot, all categorized as Standard Objects.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Account	Account	Standard Object			
Activity	Activity	Standard Object			
Address	Address	Standard Object			
Agent Work	AgentWork	Standard Object			
Alternative Payment Method	AlternativePaymentMethod	Standard Object			
API Anomaly Event Store	ApiAnomalyEventStore	Standard Object			
Appointment Category	AppointmentCategory	Standard Object			
Appointment Invitation	AppointmentInvitation	Standard Object			
Appointment Invitee	AppointmentInvitee	Standard Object			
Appointment Topic Time Slot	AppointmentTopicTimeSlot	Standard Object			

Milestone 3: Tab Creation

- Created tabs for each custom object.
- Enabled easy navigation and object access in the app.
- Ensured users can create/view records from the UI.

OUTPUT SCREENSHOT



Milestone 4: Lightning App Setup

- Built a custom Lightning App named " Banquet Hall Booking".
- Added relevant tabs to centralize operations.
- Simplified user workflow by grouping features.

OUTPUT SCREENSHOT

The screenshot displays the Salesforce Lightning Experience App Manager interface. The left sidebar shows the navigation menu with 'App Manager' selected. The main content area shows a list of 11 apps, sorted by App Name. The 'Banquet Hall Booking' app is listed as item 6, created on 6/19/2025 at 11:51 PM, and is a Lightning app. The interface includes a search bar, a 'Search Setup' button, and a 'New Lightning App' button.

	App Name ↑	Developer Name	Description	Last Modified ...	Ap...	Vi...
1	All Tabs	AllTabSet		6/15/2025, 6:30 AM	Classic	
2	Analytics Studio	Insights	Build CRM Analytics dashboards and apps	6/15/2025, 6:30 AM	Classic	✓
3	App Launcher	AppLauncher	App Launcher tabs	6/15/2025, 6:30 AM	Classic	✓
4	Approvals	Approvals	Manage approvals and approval flows	6/15/2025, 6:30 AM	Lightning	✓
5	Automation	FlowsApp	Automate business processes and repetitive tasks.	6/15/2025, 6:37 AM	Lightning	✓
6	Banquet Hall Booki...	Banquet_Hall_Booking		6/19/2025, 11:51 PM	Lightning	✓
7	Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	6/15/2025, 6:30 AM	Lightning	✓
8	Community	Community	Salesforce CRM Communities	6/15/2025, 6:30 AM	Classic	✓
9	Content	Content	Salesforce CRM Content	6/15/2025, 6:30 AM	Classic	✓
10	Data Cloud	Audience360	Build a thorough and complete understanding of your customers.	6/15/2025, 6:30 AM	Lightning	✓
11	Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recip...	6/15/2025, 6:30 AM	Lightning	✓

Milestone 5: Field Creation

Added custom and formula fields like:

- Banquet Hall, Staff, Billing

Formula:

- 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)

OUTPUT SCREENSHOT

Banquet Hall Object Fields

The screenshot displays the Salesforce Setup interface for the 'Banquet Hall' object. The left sidebar shows the navigation menu with 'Fields & Relationships' selected. The main content area shows a table of fields and their relationships.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Archestra	Archestra__c	Checkbox		
Booking Date	Booking_Date__c	Date		
Created By	CreatedById	Lookup(User)		
Customer Name	Name	Text(80)		✓
Decoration Purpose	Decoration_Purpose__c	Picklist		
DJ	DJ__c	Checkbox		
Email	Email__c	Email		

Staff Object Fields

The screenshot shows the Salesforce Setup interface for the 'Staff' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'Fields & Relationships' and shows 4 items, sorted by Field Label. The table below lists the fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Standard field	Name	Text(80)		✓

At the bottom of the page, the Windows taskbar is visible with various application icons and the system clock showing 15:28 on 28-06-2025.

Billing Object Fields

The screenshot shows the Salesforce Setup interface for the 'Billing' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'Fields & Relationships' and shows 13 items, sorted by Field Label. The table below lists the fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Archestra Amount	Archestra_Amount__c	Formula (Currency)		
Billing Name	Name	Auto Number		✓
Created By	CreatedById	Lookup(User)		
Customer Name	Customer_Name__c	Master-Detail(Banquet Hall)		✓
Decoration Amount	Decoration_Amount__c	Formula (Currency)		
DJ Amount	DJ_Amount__c	Formula (Currency)		
Email	Email__c	Email		

At the bottom of the page, the Windows taskbar is visible with various application icons and the system clock showing 15:28 on 28-06-2025.

Milestone 6: Page Layouts

- Customized page layouts per object.
- Grouped fields logically for usability.
- Enhanced record readability and data entry experience.

OUTPUT SCREENSHOT

Banquet Hall object Page Layouts

The screenshot shows the Salesforce Lightning Setup interface for the 'Banquet Hall' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships, Page Layouts (selected), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'Banquet Hall' and 'Page Layouts', showing 3 items sorted by Page Layout Name. A table lists the page layouts:

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY	
Banquet Hall Layout	manikinda akashstudent, 6/19/2025, 10:56 PM	manikinda akashstudent, 6/22/2025, 1:12 AM	▼
Celebrations	manikinda akashstudent, 6/22/2025, 1:43 AM	manikinda akashstudent, 6/22/2025, 1:48 AM	▼
Official Booking	manikinda akashstudent, 6/22/2025, 1:33 AM	manikinda akashstudent, 6/22/2025, 1:41 AM	▼

The bottom of the screen shows the Windows taskbar with various application icons and the system clock displaying 15:37 on 28-06-2025.

Staff object Page Layouts

The screenshot shows the Salesforce Setup interface for the Staff object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships, Page Layouts (selected), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'Staff' and includes a 'Page Layout Properties' window at the top. This window has a 'Fields' tab with a 'Quick Find' field and a list of fields: Section, Blank Space, Created By, and Last Modified By. Below this, the 'Staff Detail' layout is shown, featuring standard buttons (Edit, Delete, Clone, Change Owner, Change Record Type, Printable View, Sharing, Sharing Hierarchy, Edit Labels) and custom buttons. The layout includes sections for Information (Header visible on edit only), System Information (Header visible on edit only), and Custom Links (Header visible on edit only). The Information section shows 'Standard field Sample Text' and 'Owner Sample Text'. The System Information section shows 'Created By Sample Text' and 'Last Modified By Sample Text'. The Custom Links section is empty.

Billing object Page Layouts

The screenshot shows the Salesforce Setup interface for the Billing object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships, Page Layouts (selected), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'Billing' and includes a 'Page Layout Properties' window at the top. This window has a 'Fields' tab with a 'Quick Find' field and a list of fields: Section, Blank Space, Created By, Email, Last Modified By, Customer Name, Food Amount, Magician Amount, Total Amount, Archestra Amount, Decoration Amount, Food Amount per P..., and Billing Name. Below this, the 'Billing Detail' layout is shown, featuring standard buttons (Edit, Delete, Clone, Change Owner, Change Record Type, Printable View, Edit Labels) and custom buttons. The layout includes sections for Information (Header visible on edit only), System Information (Header visible on edit only), and Custom Links (Header visible on edit only). The Information section shows 'Billing Name GEN-2004-001234', 'Customer Name Sample Text', and 'Archestra Amount \$123.45'. The System Information section shows 'DJ Amount \$123.45', 'Magician Amount \$123.45', 'Kolatham Amount \$123.45', 'Food Amount per Plate \$123.45', and 'Food Amount \$123.45'. The Custom Links section is empty.

Milestone 7: Creation Of Record Types

- Type of record is created

The screenshot shows the Salesforce Setup interface. The breadcrumb trail is **SETUP > OBJECT MANAGER**. The page title is **Banquet Hall**. On the left sidebar, the **Record Types** option is selected. The main content area displays a table of Record Types for the Banquet Hall object.

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
Official Booking	it is for official meetings,lunch,gatherings	✓	manikinda akashstudent, 6/22/2025, 1:54 AM

At the bottom right of the page, the system clock shows 15:57 on 28-06-2025.

Milestone 8: Validation Rules

- Enforced data quality with validations like:
- `Booking_Date__c <= TODAY()`, “Booking Date must be a future Date”.
- Prevented invalid inputs and ensured system reliability.

OUTPUT SCREENSHOT

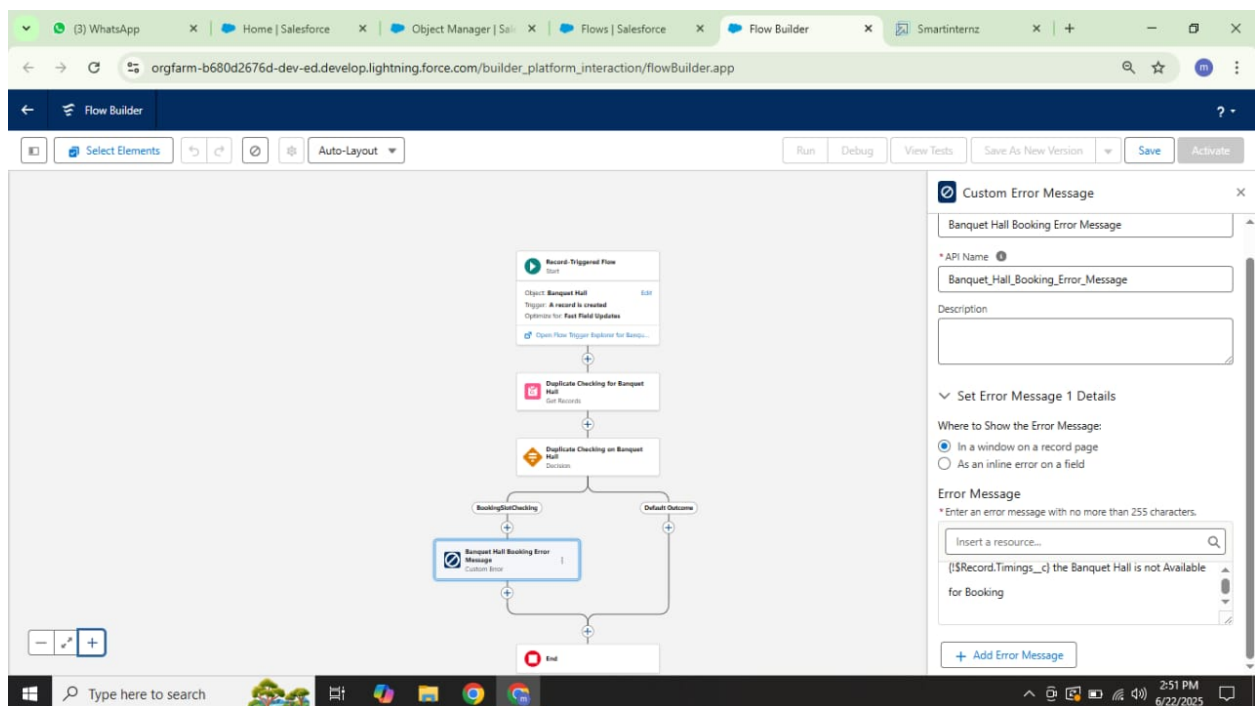
The screenshot displays the Salesforce Lightning Setup interface, specifically the 'Object Manager' section for the 'Banquet Hall' object. The 'Validation Rules' tab is selected, showing a list of validation rules. A single rule, 'BookingDateChecking', is listed with the error message 'Booking Date must be a future Date'. The rule is active and was modified by 'manikinda akashstudent' on 6/22/2025 at 1:57 AM. The left sidebar shows the navigation menu with options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The bottom status bar shows the system time as 15:53 on 28-06-2025.

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
BookingDateChecking	Booking Date	Booking Date must be a future Date	✓	manikinda akashstudent, 6/22/2025, 1:57 AM

Milestone 9: Flow Setup

- Designed a record-triggered flow
- Improved automation and reduced manual input errors

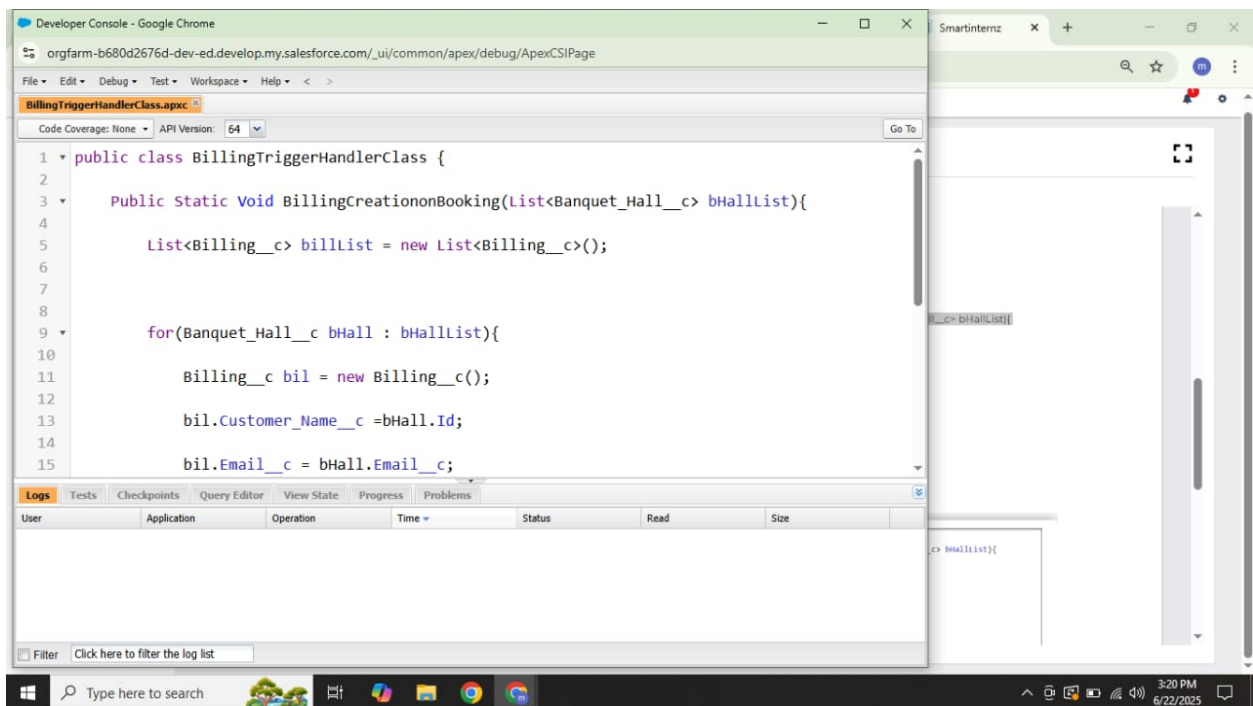
OUTPUT SCREENSHOT



Milestone 10: Apex Trigger

- Developed a trigger to validate:
 - Only users with role “Event Coordinator” can be added as Event Coordinator.
 - Only “Staff” can be added as Staff.
- Ensured business logic is enforced at data level

OUTPUT SCREENSHOT



Developer Console - Google Chrome

orgfarm-b680d2676d-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage

File Edit Debug Test Workspace Help < >

BillingTriggerHandlerClass.apxc BillingTrigger.apxt

Code Coverage: None API Version: 64 Go To

```
9 for(Banquet_Hall_c bHall : bHallList){
10
11     Billing__c bil = new Billing__c();
12
13     bil.Customer_Name__c =bHall.Id;
14
15     bil.Email__c = bHall.Email__c;
16
17     billList.add(bil);
18
19 }
20
21 if(!billList.isEmpty()){
22
23     insert billList;
```

Logs Tests Checkpoints Query Editor View State Progress Problems

Name	Line	Problem
BillingTrigger	-1	Trigger name, BillingRecordCreation, exists on different sObject type: Billing__c

Smartinternz x +

Type here to search

3:17 PM 6/22/2025

Developer Console - Google Chrome

orgfarm-b680d2676d-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage

File Edit Debug Test Workspace Help < >

BillingTriggerHandlerClass.apxc TriggerBilling.apxt

Code Coverage: None API Version: 64 Go To

```
1 trigger BillingRecordCreation on Banquet_Hall__c (after insert) {
2
3     if(trigger.isInsert){
4
5         if(trigger.isAfter){
6
7             BillingTriggerHandlerClass.BillingCreationonBooking(trigger.new);
8
9         }
10
11     }
12
13 }
14
```

Logs Tests Checkpoints Query Editor View State Progress Problems

User	Application	Operation	Time	Status	Read	Size
------	-------------	-----------	------	--------	------	------

Filter Click here to filter the log list

Smartinternz x +

Type here to search

3:21 PM 6/22/2025

Milestone 11: Reports

- Created reports for:
 - Banquet Halls with Billings Report
- Used grouping, filters, and field summaries.
- Enabled data-driven decision-making.

OUTPUT SCREENSHOT

Report: Banquet Halls with Billings
Banquet Halls with Billings Report

Total Records: 6 Total Total Amount: \$200,000.00

<input type="checkbox"/> Booking Date ↑	<input type="checkbox"/> Total Amount	<input type="checkbox"/> Timings
<input type="checkbox"/> 7/28/2025 (1)	\$50,000.00	morning
Subtotal	\$50,000.00	
<input type="checkbox"/> 8/15/2025 (2)	\$50,000.00	evening
	\$50,000.00	evening
Subtotal	\$100,000.00	
<input type="checkbox"/> 10/22/2025 (1)	\$50,000.00	evening
Subtotal	\$50,000.00	
<input type="checkbox"/> 11/16/2025 (2)	\$0.00	morning
	\$0.00	morning
Subtotal	\$0.00	
Total (6)	\$200,000.00	

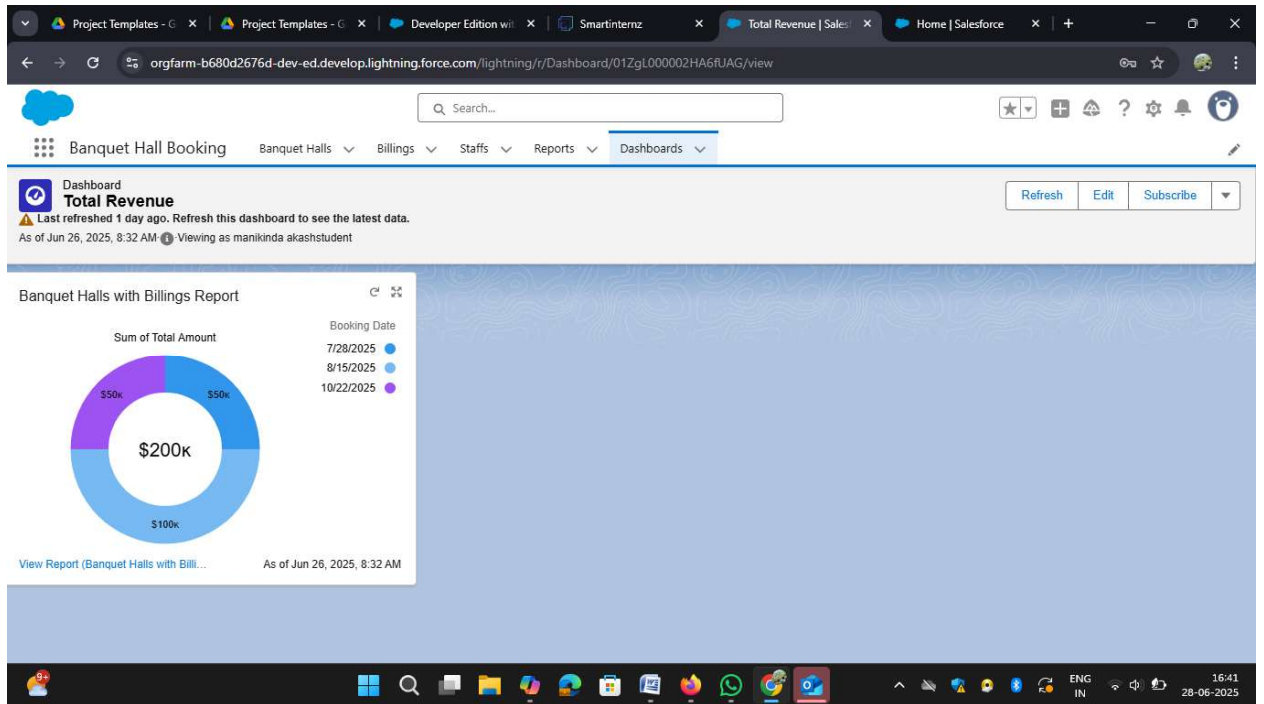
Row Counts ☒ Detail Rows ☒ Subtotals ☒ Grand Total ☒

16:34 28-06-2025

Milestone 12: Dashboards

- Designed dashboards showing:
 - Total Revenue and role summary.
- Used pie, and summary widgets for visualization.

OUTPUT SCREENSHOT



Milestone 12: Final Review

- Conducted full system testing.
- Checked all object links, flows, triggers, reports.
- Confirmed the CRM is fully functional and stable.

Dataset

The system was tested with the following types of data:(Sample Records and Input Values Used During Testing)

Object	Samples Fields Used
Venue	Name: Grand Plaza, Location: Downtown, capacity
Customer	Name: Rajesh, Email: rajesh@gmail.com
Event Coordinator	Name: Priya, Role: Event Coordinator, phone: 8910985504
Vendor Package	Package Name: Premium Catering, Services included: Catering, Cost:\$5000
Booking	Booking ID: B001, Date:2025-06-27, Number Pf Guests 250, booking Status: confirmed
Payment	Booking ID: B001,Amount:\$7500, Payment Mode: Credit Card

Note: All test records were created using Salesforce's UI and validated via flows and formula fields