

# A CRM Application for Banquet Hall Booking

**Project Title:**

A CRM Application for Banquet Hall Booking

**Platform:** Salesforce (SmartInternz Guided Project)

**Team ID :** LTVIP2025TMID30114

**Team Size:** 2

**Team Leader :** Maddela Nithin Teja

**Team member :** Shaik Ameer Basha

**College:** Rise Krishna Sai Gandhi Group Of Institution

**Mentor:** Ganesh

## **Abstract:**

This project aims to simplify and streamline the process of booking banquet halls through a centralized CRM application. Built on the Salesforce platform, the application enables efficient management of hall bookings, customer data, availability tracking, and service coordination — all in one place. This ensures a better experience for both hall managers and clients.

## **Problem Statement:**

Booking a banquet hall traditionally involves manual communication, lack of availability tracking, and inefficient management of customer preferences and services. There is a clear need for a cloud-based, automated platform that connects customers with banquet hall providers in real-time, reducing confusion and increasing booking efficiency.

## **What is CRM:**

CRM stands for customer relationship management, which is a system for managing all of your company's interactions with current and potential customers. The goal is simple: improve relationships to grow your business.

## **Salesforce:**

The world's leading customer relationship management technology, helping you build and improve your customer relationships. In 1999 we pioneered cloud-based CRM and today we're helping organization of all sizes re-imagine their business for the world of AI. With Agentforce, providing trusted, autonomous AI agents that take action for your employees and customers. With unified data from all your systems, so every employee has a 360-degree view of every customer. And with #1 CRM apps for your sales, service, marketing, commerce and IT teams.

It is composed of the Sales Cloud, Marketing Cloud, Service Cloud, Experience Cloud, Commerce Cloud and the Analytics Cloud.

It consist of different elements such as Objects, Fields, Apex classes, Apex Trigger, Flows, Tabs, Lightning Apps, Page Layouts, Record types, Validation Rules, Approval process, work flow rules, process builders, Remote site setting, connected apps, named credential, Profiles, Permission sets, Role, reports, and Dashboards.

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.

Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud. So what does that really mean? Well, before Salesforce, your contacts, emails, follow-up tasks, and prospective deals might have been organized something like this

### Introduction of the Organization:

- An organization is the virtual space provided to an individual customer of sales force.
- your organization includes all of your data and applications, and is separate from all others organizations
- when a customer purchase Salesforce they are provided with an any which facts as the containers for their data.
- Vision, Mission, and Values of the Organization

### Vision:

They believe that the business of business is to improve the state of the world, and work to make sure Salesforce is a platform for change through serving the interests of all our stakeholders-employees, customers, partners, communities and the environment. They are working to play a meaningful role in creating a sustainable, low-carbon future by: Working toward 100 percent renewable energy for our global operations.

## **Mission:**

Salesforce, the Customer Success Platform and world's 1 CRM, empowers companies to connect with

their customers in a whole new way. The company was founded on three disruptive ideas: a new

technology model in cloud computing, a pay-as-you-go business model, and a new integrated

corporate philanthropy model.

## **Policy of the organization:**

Salesforce is the controller of your personal data and is responsible for its processing unless expressly

specified otherwise in our full privacy statements for avoidance of doubt, our policy statements does

not apply to the extent we process personal data.

## **Organizational structure:**

Salesforce is led by a relatively large executive team. Interestingly, the company has two CEOs.

## **Project Objective**

- To develop a Salesforce-based CRM platform that manages banquet hall bookings.
- Enable hall owners to register and update availability.
- Allow customers to view, request, and confirm bookings.
- Automate responses and notifications via workflows.
- Generate insightful reports and dashboards for booking statistics.

## Technology Stack

- Salesforce CRM

- Custom & Standard Objects
- Apex Triggers and Flows
- Lightning App Builder
- Reports & Dashboards

## Project Modules

1. Hall Registration and Management
2. Customer Booking System
3. Availability Checker
4. Booking Confirmation & Status Update
5. Reports & Dashboard Visualization

## Architecture Diagram & Data Flow

- Customer → Booking Request → Booking Object
- Hall Owner → Availability → Booking Confirmation
- Workflow → Email Notification → Customer
- Booking → Dashboard → Status Tracking

## Salesforce Elements :

### Objects:

Objects are simply database tables that allow us to store data specific to the organization in Salesforce. Salesforce Objects can be considered the building blocks for the energetic and versatile platform known as Salesforce CRM. There are 2 types of Objects in Salesforce

- Standard Objects
- Custom Objects

### Fields:

A field is a column within an object for storing data. It constitutes the fundamental unit of data storage in Salesforce. Fields come in various types, including text, number, picklist, date, and more, and they are employed to house data that pertains to a particular object.

### Lightning App:

An app is a collection of items that work together to serve a particular function. Salesforce apps come in two flavors: Classic apps and Lightning apps. Classic apps are created and managed in Salesforce Classic. Lightning apps are created and managed in Lightning Experience.

### Tab:

Tabs are the user interface elements that provide access to objects, functions, or data. They represent the front end of your Salesforce experience. Objects: Objects, on the other hand, are the backend structures that hold data.

### Apex Trigger:

Apex triggers enable you to perform custom actions before or after changes to Salesforce records, such as insertions, updates, or deletions. A trigger is Apex code that executes: Before or after an insert operation. Before or after an update operation. Before or after a delete operation.

### Apex Class:

Apex is a strongly typed, object-oriented programming language that allows developers to execute flow and transaction control statements on the Salesforce platform. If you're used to Java or .NET development, you'll find the programming in Apex fairly straightforward.

## **Flow:**

Salesforce Flows are an automation tool provided by Salesforce which can be used to perform various tasks like, Sending an Email, Posting a chatter, Sending custom Notifications &, etc.

## **Validation Rule:**

Validation Rules are powerful tools on the Salesforce Platform that are used to enforce data quality and ensure that the data entered into your Salesforce org meets your requirements. They act as a safeguard, preventing users from saving records that do not follow your predefined business rules.

## **Page Layout:**

Page Layout in Salesforce allows us to customize the design, organize details, and edit pages of records in Salesforce. They can control the appearance of fields, related lists, and custom links on standard and custom objects' detail and edit pages.

## **Record Type:**

A Record Type allows you to have different versions of an Opportunity record for different sales processes (for example: retail versus wholesale sales). Each Record Type can have its own set of fields, Page Layouts, and logic, tailored to the specific needs of your business processes.

## **Reports:**

Reports give you access to your Salesforce data. You can examine your Salesforce data in almost infinite combinations, display it in easy-to-understand formats, and share the resulting insights with others. Before building, reading, and sharing reports, review these reporting basics.

## **Dashboards:**

Dashboards let you curate data from reports using charts, tables, and metrics. If your colleagues need more information, they can view your dashboard's data-supplying reports. Filter a Dashboard. Dashboard filters make it easy for users to apply different data perspectives to a single dashboard.



## Formula field:

A formula field uses other field values or expressions to derive a new logical value automatically. They can calculate values using fields within a single record or reference cross-object fields. A formula field allows developers to control how data is displayed to the end-users.

## Master- Detail Relationship:

A Master-Detail Relationship in Salesforce is a tight linkage between two objects where the master (parent) object controls certain behaviors of the detail (child) object.

Below are the following features of a Master-Detail relationship.

- When a record of the master object is deleted, its related detail records are also deleted.
- The detail record inherits the sharing and security settings of its master record.
- The Owner field on the detail object is not available and is automatically set to the owner of its associated master record. Custom objects on the detail side of a master-detail relationship cannot have sharing rules, manual sharing, or queues, as these require the Owner field.
- It is required on the page layout of the detailed record.
- By default, records can't be re-parented in master-detail relationships. Administrators can, however, allow child records in master-detail relationships on custom objects to be represented to different parent records by selecting the Allow representing option in the master-detail relationship definition.

## Project Details:

Created 2 Objects for this project Banquet Hall ,Billing , and created the fields in each objects to store the details of what customer needs like DJ, Food, Decorations along with the Banquet hall.

Created a master detail relationship between Banquet hall and billing . Billing as parent and banquet hall as child , once billing record is deleted then Banquet Hall record will also get deleted.

Most of the fields in Billing object are Formula fields where the values will be derived from the Banquet Hall fields.

SETUP > OBJECT MANAGER

Banquet Hall

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Object Access

Translations

Fields & Relationships

19 Items. Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE
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
Food	Food_Menu__c	Picklist
Kolatam	Kolatam__c	Checkbox
Last Modified By	LastModifiedById	Lookup(User)
Magician	Magician__c	Checkbox

SETUP > OBJECT MANAGER

**Billing**

Details	<b>Fields &amp; Relationships</b>	13 Items, Sorted by Field Label			Q, Quick Find	New	Deleted Fields	Field Dependencies
<b>Fields &amp; Relationships</b>								
Page Layouts								
Lightning Record Pages								
Buttons, Links, and Actions								
Compact Layouts								
Field Sets								
Object Limits								
Record Types								
Related Lookup Filters								
Search Layouts								
List View Button Layout								
Restriction Rules								
Scoping Rules								
Object Access								
Triangler								

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Orchestra Amount	Orchestra_Amount__c	Formula (Currency)		
Created By	CreatedById	Lookup(User)		
Customer Name	Customer_Name__c	Master-Detail(Banquet Hall)		✓
Customer Name	Name	Auto Number		✓
Decoration Amount	Decoration_Amount__c	Formula (Currency)		
DJ Amount	DJ_Amount__c	Formula (Currency)		
Email	Email__c	Email		
Food Amount	Food_Amount__c	Formula (Currency)		
Food Amount per Plate	Food_Amount_per_Plate__c	Formula (Currency)		
Kolam Amount	Kolam_Amount__c	Formula (Currency)		
Last Modified By	LastModifiedById	Lookup(User)		

Created the App and Tabs for each objects I.e Billing, Banquet Hall

Cloud logo

Q Search...

Banquet Hall Booking

Banquet Halls

Billings

People

Reports

Dashboards

Banquet Halls

Recently Viewed

1 Item - Updated a few seconds ago

Customer Name

1 ABC

New

Import

Change Owner

Assign Label

Q Search this list...

Created a Validation Rule to restrict the Customer selecting the date earlier than today. If Customer selects the booking date as today or Earlier this validation rule will throw the error and record will not Save.

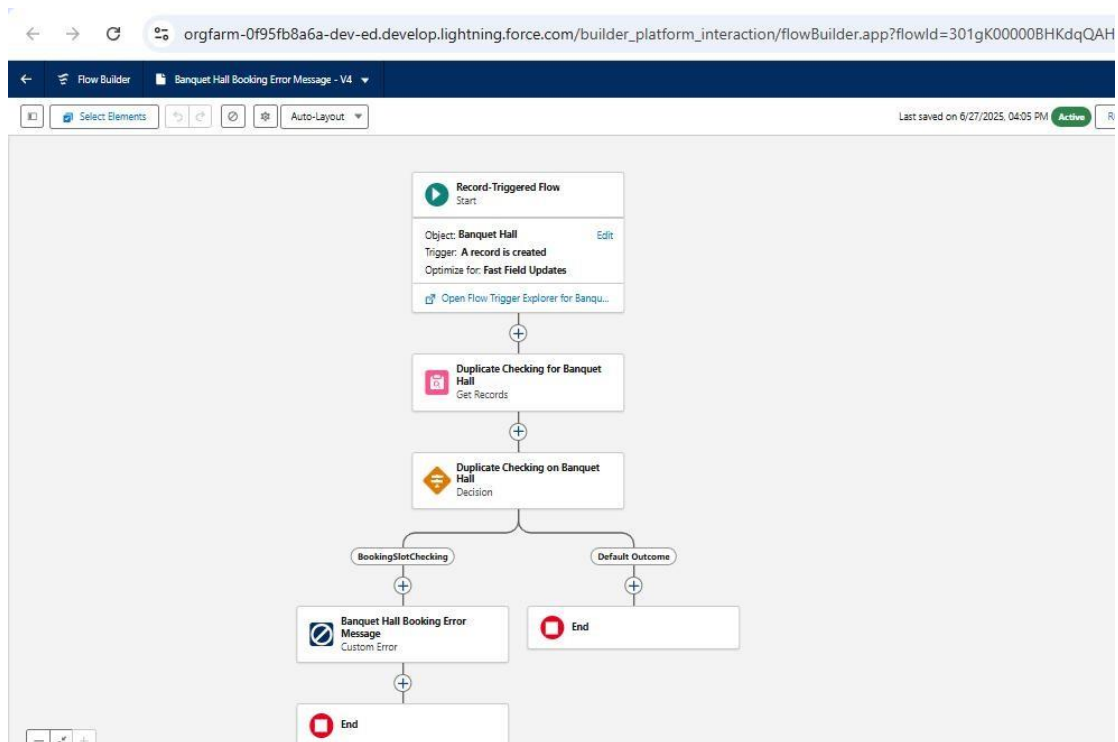
## Banquet Hall Validation Rule

[Back to Banquet Hall](#) Help for

Validation Rule Detail			
Rule Name	BookingDateChecking	Active	<input checked="" type="checkbox"/>
Error Condition Formula	Booking_Date__c <= TODAY()		
Error Message	Booking Date must be a future Date	Error Location	Booking Date
Description			
Created By	KOYI RUKMINI DEVI, 6/26/2025, 6:55 AM	Modified By	KOYI RUKMINI DEVI, 6/26/2025, 6:55 AM

[Edit](#) [Clone](#)

Created a Record Triggred Flow , to check if any customer booked the Banquet Hall on the same date as new customer selected the date.This Flow will trigger after the Banquet Hall record is saved to Database.



Created a Trigger and apex class , to create a billing record after the Banquet Hall.

```
BillingTriggerHandlerClass.apxc * BillingRecordCreation.apxt
Code Coverage: None API Version: 64
1 public class BillingTriggerHandlerClass {
2
3     Public Static Void BillingCreationonBooking(List<Banquet_Hall__c> bHa.
4
5         List<Billing_object__c> billList = new List<Billing_object__c>();
6
7     for(Banquet_Hall__c bHall : bHallList){
8
9         Billing_object__c bil = new Billing_object__c();
10
11         bil.Customer_Name__c =bHall.Id;
12
13         bil.Email__c = bHall.Email__c;
14
15         billList.add(bil);
16
17     }
18
19     if(!billList.isEmpty()){
20
```

```
BillingTriggerHandlerClass.apxc * BillingRecordCreation.apxt
Code Coverage: None API Version: 64
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 }
```

Created the page Layouts , Records types for Banquet Hall:

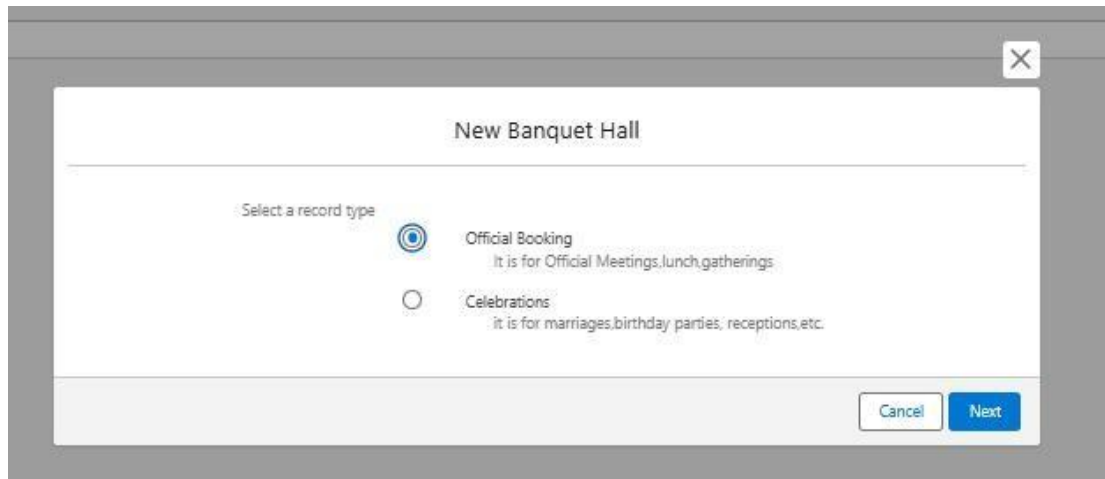
Record Types			
2 Items, Sorted by Record Type Label			
		Quick Find	New Page Layout Assignment
RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
Celebrations	It is for marriages, birthday parties, receptions, etc.	✓	KOYI RUKMINI DEVI, 6/27/2025, 3:04 AM
Official Booking	It is for Official Meetings, lunch, gatherings	✓	KOYI RUKMINI DEVI, 6/27/2025, 3:04 AM

Setup	home	Object Manager
Banquet Hall		
Details	Page Layouts	
Field & Relationships	3 Items, Sorted by Page Layout Name	
Page Layouts		
Lightning Record Pages		
Buttons, Links, and Actions		
Compact Layouts		
Field Sets		
Object Limits		
Record Types		
Related Lookup Filters		
Search Layouts		
List View Button Layout		

A customer who wants to book a Banquet Hall can create a record by clicking New button on Banquet Hall Page.

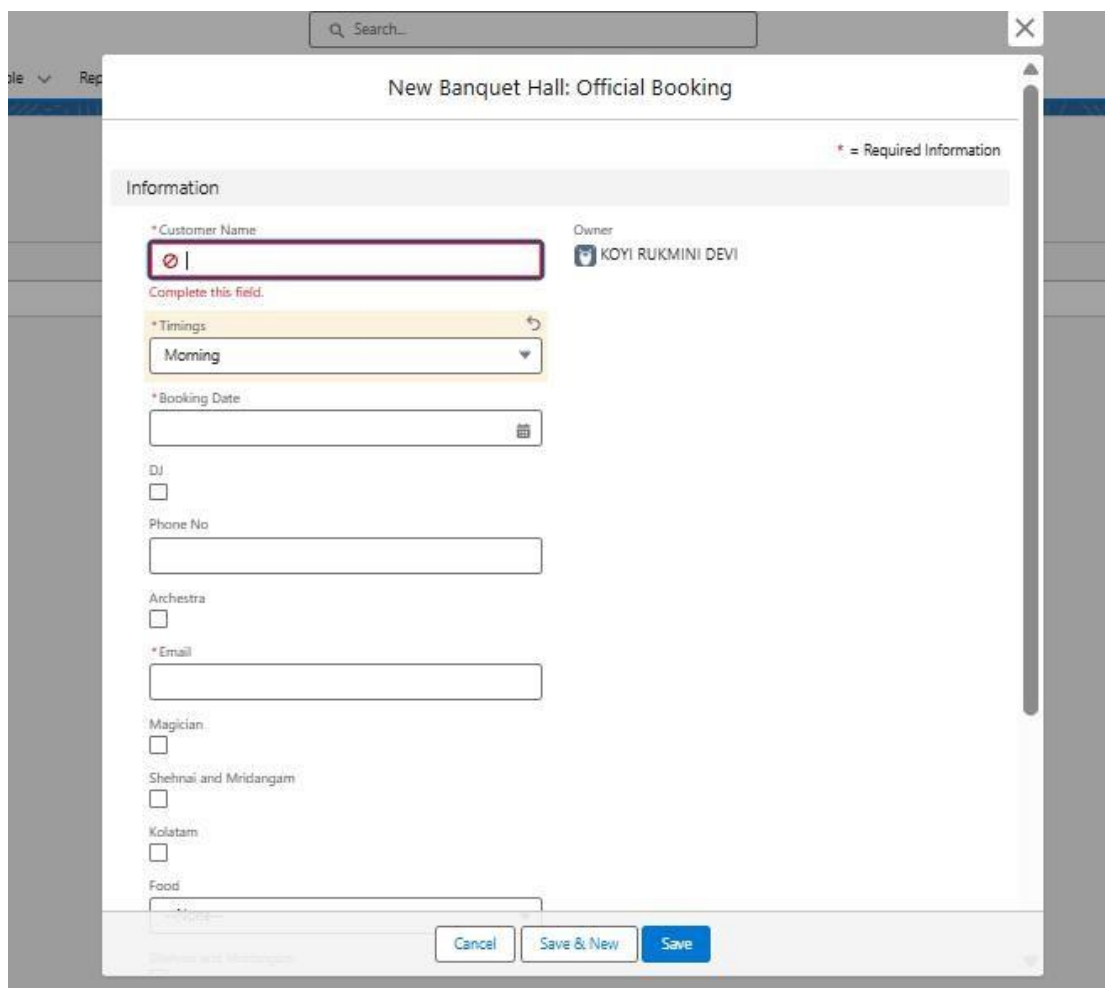
Banquet Hall Booking	Banquet Halls	Billings	People	Reports	Dashboards
Banquet Halls					
Recently Viewed					
1 Item • Updated a few seconds ago					
Customer Name					
1	ASC				

And select the record type



A screenshot of a web application window titled "New Banquet Hall". The window has a close button (X) in the top right corner. Inside, there is a section titled "Select a record type" with two radio button options. The first option, "Official Booking", is selected and includes the text "It is for Official Meetings,lunch,gatherings". The second option, "Celebrations", is unselected and includes the text "It is for marriages,birthday parties, receptions,etc.". At the bottom right of the form, there are two buttons: "Cancel" and "Next".

And then fill the records with details :



A screenshot of a web application window titled "New Banquet Hall: Official Booking". The window has a search bar at the top and a close button (X) in the top right corner. The form is titled "Information" and includes a legend indicating that an asterisk (\*) denotes required information. The form fields are as follows: "Customer Name" (a text input field with a red error message "Complete this field." and a red border), "Owner" (a dropdown menu showing "KOYI RUKMINI DEVI"), "Timings" (a dropdown menu showing "Morning"), "Booking Date" (a date picker), "DJ" (a checkbox), "Phone No" (a text input field), "Archestra" (a checkbox), "Email" (a text input field), "Magician" (a checkbox), "Shehnai and Mridangam" (a checkbox), "Kolattam" (a checkbox), and "Food" (a text input field). At the bottom of the form, there are three buttons: "Cancel", "Save & New", and "Save".

Record will be saved in database:

Related

Details

Customer Name	ABC	Owner	KOYI RUKMINI DEVI
Timings	Morning		
Booking Date	6/28/2025		
DI	<input checked="" type="checkbox"/>		
Phone No	76689798987		
Archestra	<input checked="" type="checkbox"/>		
Email	abc@gmail.com		
Magician	<input checked="" type="checkbox"/>		
Shehnai and Mridangam	<input checked="" type="checkbox"/>		
Kolattam	<input checked="" type="checkbox"/>		
Food	Special Veg		
Shehnai and Mridangam	<input checked="" type="checkbox"/>		
No of Visitors	10		
Decoration Purpose			

After the Banquet Hall record is created , a billing record will be created automatically in the Salesforce

Related

Details

Customer Name	BILL-0002
Email	abc@gmail.com
Customer Name	ABC
Archestra Amount	\$50,000.00
DI Amount	\$70,000.00
Magician Amount	\$15,000.00
Kolattam Amount	\$15,000.00
Food Amount per Plate	\$550.00
Shehnai and Mridangam Amount	\$25,000.00
Food Amount	\$5,500.00
Decoration Amount	\$50,000.00
Created By	KOYI RUKMINI DEVI / 6/27/2025, 3:36 AM
Last Modified By	KOYI RUKMINI DEVI / 6/27/2025, 3:36 AM

By this way a customer can create a record . If the customer chooses earlier date then following error will populate.



## New Banquet Hall: Official Booking

\* = Required Information

### Information

\* Customer Name

XYZ

Owner



KOYI RUKMINI DEVI

\* Timings

Morning

\* Booking Date

6/25/2025



Booking Date must be a future Date

DJ



Phone No

14235345356

Archestra



\* Email

xyz@gmail.com

Magician



Shehnai and Mridangam



Kolamam



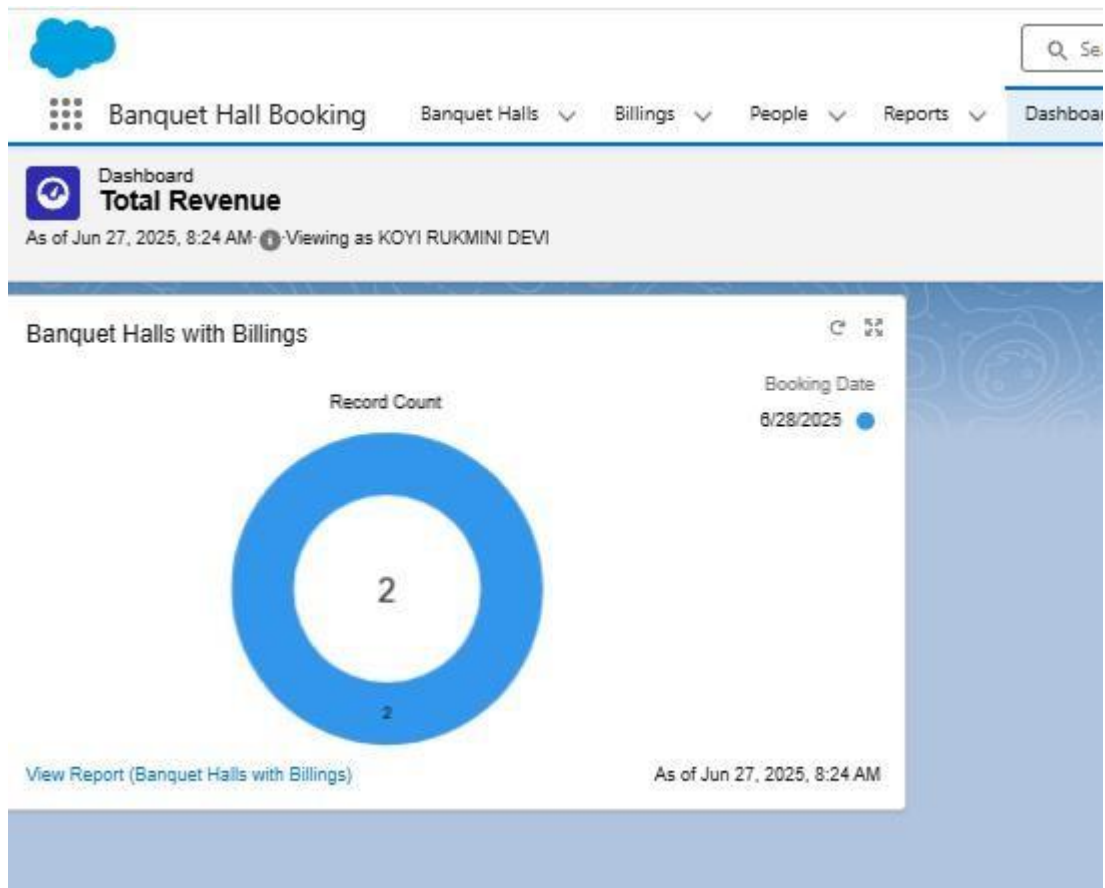
Cancel

Save & New

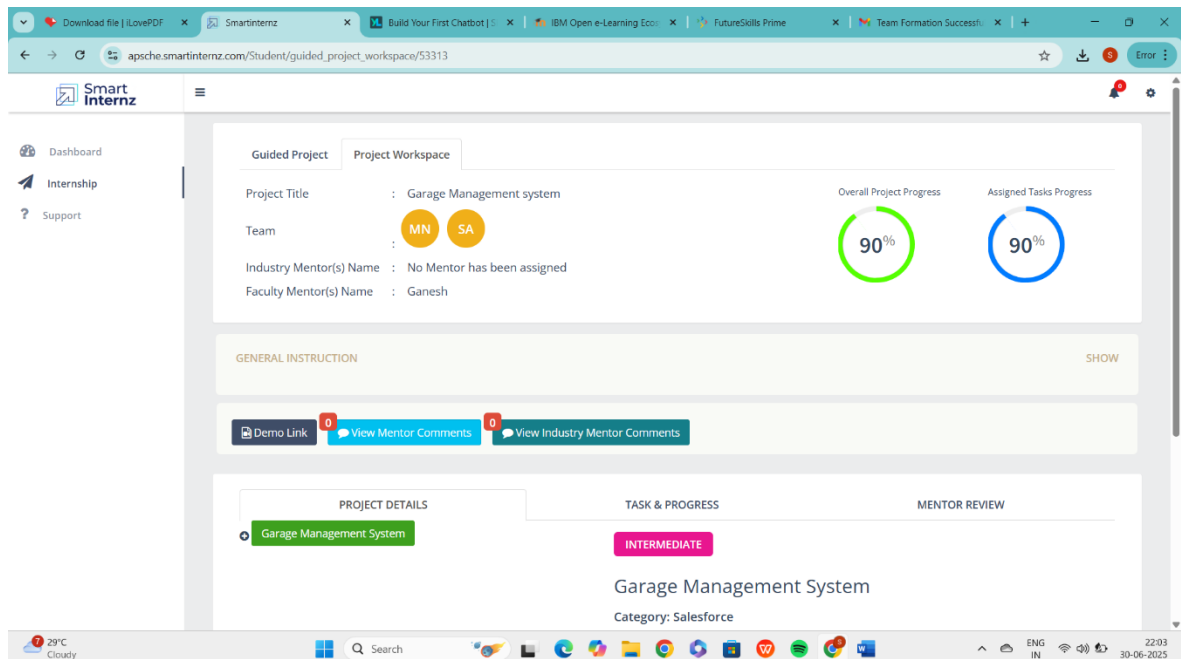
Save

If the Customer chooses the same date as Existing record date the following error will thrown.





## Report View with Volunteer



## Testing

- Validated form submissions for new bookings.
- Ensured proper flow of booking requests and email alerts.
- Checked hall availability updates and real-time display.
- Reports generated accurately based on bookings per hall.

## Conclusion

The project “A CRM Application for Banquet Hall Booking” successfully demonstrates the use of Salesforce to digitize and streamline the event venue booking process. With modules that manage halls, customers, and bookings in real-time, the system offers a structured and efficient solution for a commonly faced problem in event planning.

By implementing the enhanced Banquet Hall Booking Management System in Salesforce, the venue can offer a seamless experience for clients seeking banquet hall services, catering/menu options, DJ services, decorations, and marriage-related services. This comprehensive solution will streamline operations, enhance customer experience, and drive revenue growth through efficient booking management and personalized service delivery.

## References

- Salesforce Trail head
- Smart Interns Guided Project Materials
- APSCHS & Smart Bridge Guidelines