

A CRM APPLICATION FOR BANQUET HALL BOOKING



Introduction:

Banquet hall booking involves the process of reserving a venue space for various events such as weddings, corporate gatherings, birthday parties, and other special occasions. This process typically begins with a client's inquiry about the availability of the banquet hall for their desired date and event type. The client discusses their event requirements including the date, expected number of guests, preferred layout, catering options, and any specific requests they may have. Based on the client's requirements, the banquet hall provides a detailed proposal outlining the available packages, pricing, inclusions, and any additional services or amenities. After the booking is confirmed, the banquet hall's event coordinator or planning team works closely with the client to plan and coordinate all aspects of the event. This includes finalizing event details, such as seating arrangements, menu selection, décor preferences, audiovisual requirements, and any other special requests. On the day of the event, the banquet hall staff ensure everything runs smoothly, troubleshoot any issues that may arise, and provide assistance to the client and their guests as needed.

Project Overview:

This project is to develop a comprehensive booking management system for a banquet hall business using Salesforce. The system will streamline the booking process, manage event details, and provide insights into sales and revenue. Additionally, it will include features to manage catering/menu selection, DJ services, decorations, themes related to weddings, and other marriage-related services. Implement flow to ensure data integrity and prevent double bookings.

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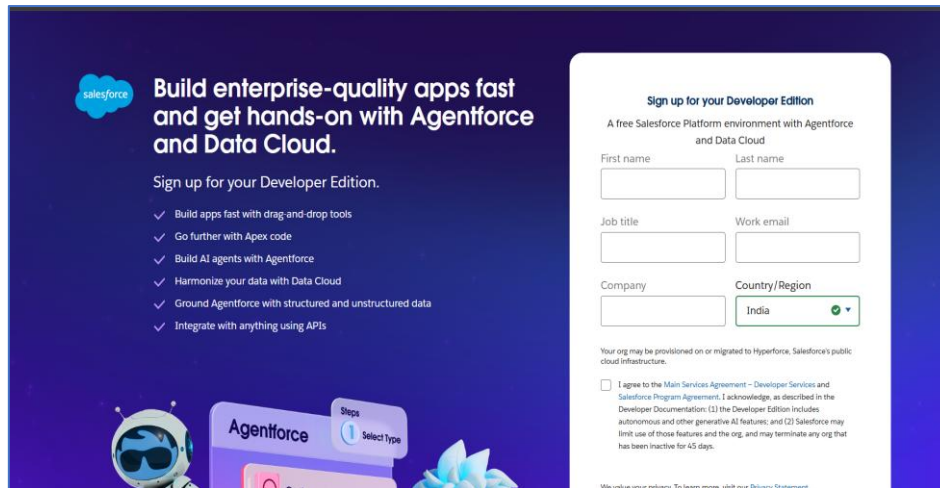
MILESTONE 1

SALESFORCE

Activity 1: Creating Developer Account

Creating a developer org in salesforce.

1. Go to <https://developer.salesforce.com/signup>
2. On the sign-up form, enter the following details:



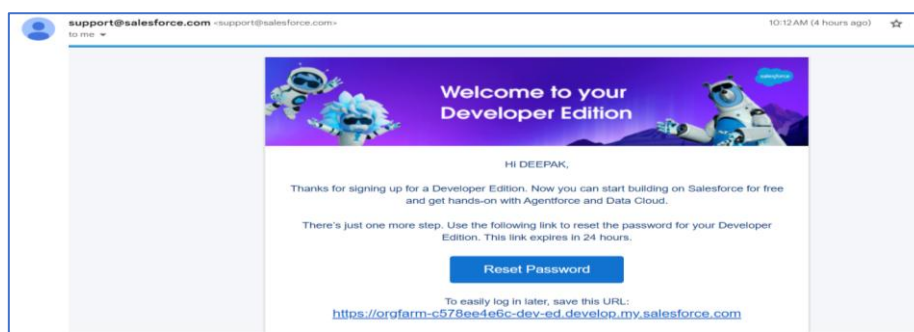
The screenshot shows the Salesforce Developer Edition sign-up page. On the left, there's a blue background with the Salesforce logo and text: "Build enterprise-quality apps fast and get hands-on with Agentforce and Data Cloud." Below this, it says "Sign up for your Developer Edition." and lists five benefits with checkmarks: "Build apps fast with drag-and-drop tools", "Go further with Apex code", "Build AI agents with Agentforce", "Harmonize your data with Data Cloud", and "Ground Agentforce with structured and unstructured data". At the bottom left, there's a cartoon robot character. On the right, there's a white sign-up form titled "Sign up for your Developer Edition". The form includes fields for "First name", "Last name", "Job title", "Work email", "Company", and "Country/Region" (with a dropdown menu showing "India"). Below the form, there's a checkbox for "I agree to the Main Services Agreement - Developer Services and Salesforce Program Agreement" and a link to "View our Privacy Statement".

1. First name - JABEERULLA
2. Last name – TIRUPATI SAYED
3. Email – tsjabeerulla2004@gmail.com
4. Role - Developer
5. Company – Gayatri Degree College Tirupati
6. Country - India

Activity 2: Account Activation:

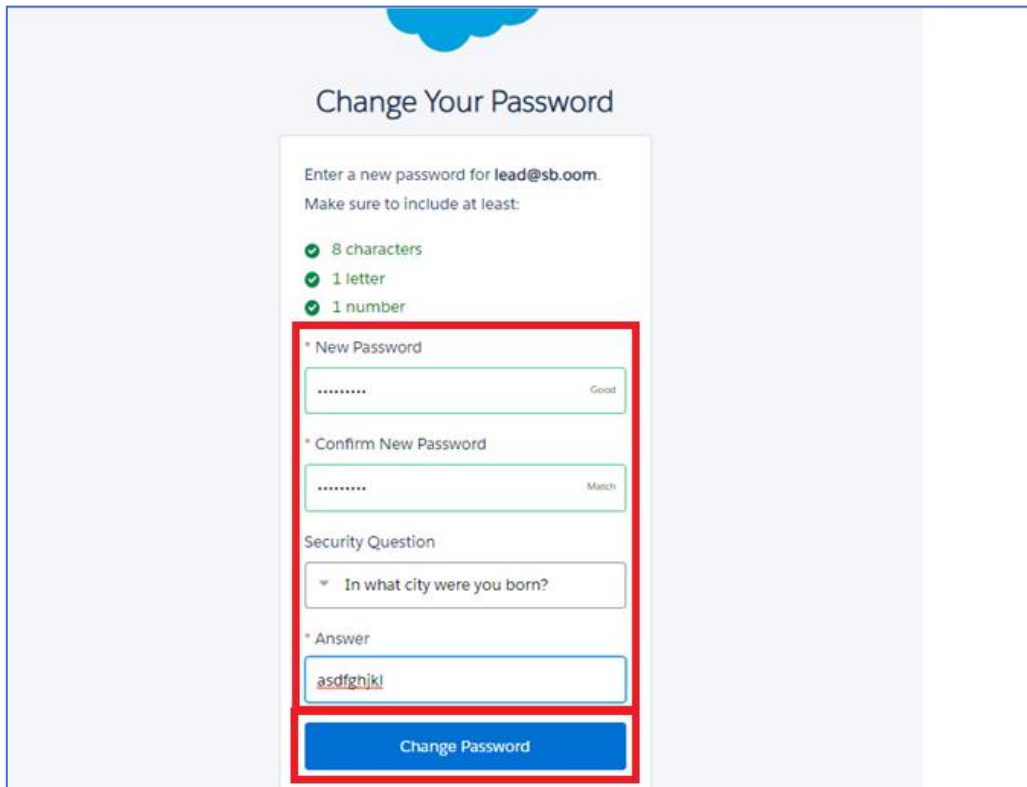
Account Activation:

1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins.



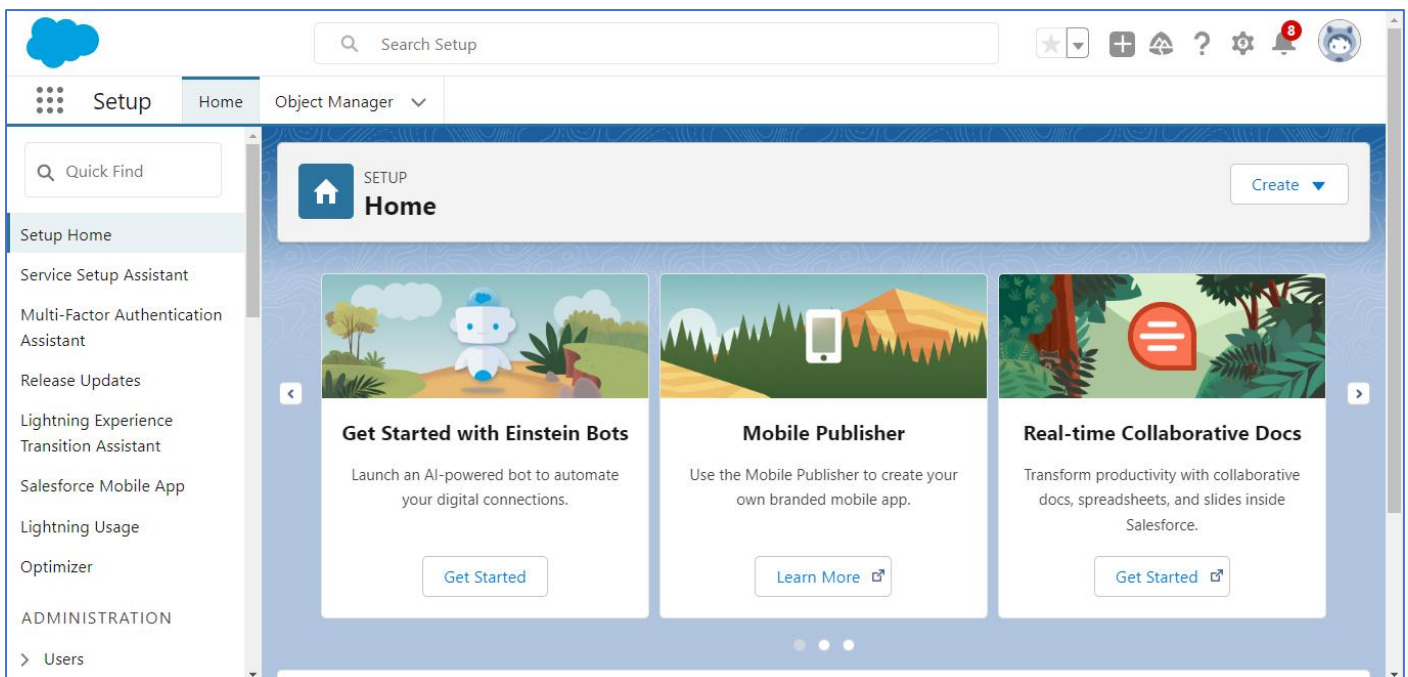
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2. Click on Verify Account
3. Give a password and answer a security question and click on change password.



The screenshot shows the 'Change Your Password' page in Salesforce. The form is titled 'Change Your Password' and asks the user to enter a new password for the email 'lead@sb.oom'. It includes a list of requirements: 8 characters, 1 letter, and 1 number, all of which are marked as satisfied with green checkmarks. The form has two password input fields: 'New Password' and 'Confirm New Password', both showing 'Good' and 'Match' status respectively. Below these is a 'Security Question' dropdown menu set to 'In what city were you born?'. The 'Answer' field contains the text 'asdfghjkl'. A red rectangular box highlights the password and security question fields. At the bottom of the form is a blue 'Change Password' button.

4. Then you will redirect to your salesforce setup page.



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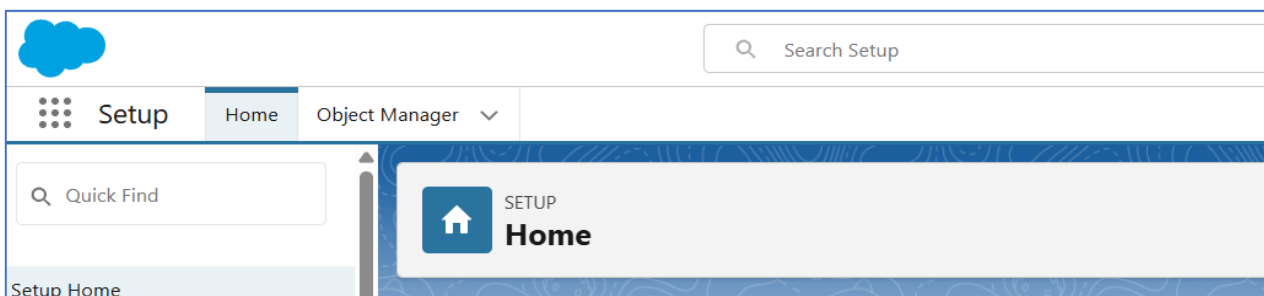
MILESTONE 2

OBJECT

Activity 1: Creating a Banquet Hall Object

The purpose of creating a Banquet Hall custom object is to store and manage information about Banquet Hall Bookings.

1. To create an object:
2. From the setup page
3. Click on Object Manager



4. Click on Create --> Click on Custom Object.
5. Enter the label name--> Banquet Hall
6. Enter Plural label name --> Banquet Halls

7. Enter Record Name --> Customer Name
8. Select Data Type as Text.
9. Select Allow reports.

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Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account" called "Name" when referenced via the API.

Record Name **Example: Account Name**

Data Type **Warning:** If you plan to insert a high volume of records in this object, via the API, you may experience performance issues.

Optional Features

☒ Allow Reports
☐ Allow Activities
☐ Track Field History
☐ Allow in Chatter Groups
☐ Enable Licensing [i](#)

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Standard Object.

☒ Allow Sharing
☒ Allow Bulk API Access
☒ Allow Streaming API Access

10. Select Allow search.

11. Click on Save and New

Search Status

When this setting is enabled, your users can find records of this object type when they search. [Learn more.](#)

☒ Allow Search

Activity 2: Creating a Billing Object

1. Enter the label name--> Billing object.
2. Enter Plural label name --> Billing objects.

Custom Object Definition Edit

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label **Example: Account**

Plural Label **Example: Accounts**

Starts with vowel sound ☐

The Object Name is used when referencing the object via the API.

Object Name **Example: Account**

Description

Context-Sensitive Help Setting ☒ Open the standard Salesforce.com Help & Training window
☐ Open a window using a Visualforce page

Content Name

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3. Enter Record Name --> Billing No
4. Select Data Type as Auto Number.
5. Format as BILL-{0000}
6. Select Allow reports.

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name called "Name" when referenced via the API.

Record Name: Example: Account Name

Data Type: Warning: If you plan to insert a high volume of records, you may want to select a different data type.

Display Format: Example: A-{0000} [What Is This?](#)

Optional Features

- ☒ Allow Reports
- ☐ Allow Activities
- ☐ Track Field History
- ☐ Allow in Chatter Groups
- ☐ Enable Licensing

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Standard Object.

- ☒ Allow Sharing
- ☒ Allow Bulk API Access
- ☒ Allow Streaming API Access

7. Select Allow search.
8. Click on Save and New.

Search Status

When this setting is enabled, your users can find records of this object type when they search. [Learn more.](#)

☒ Allow Search

Activity 3: Creating a Staff Object

1. Enter the label name--> Staff
2. Enter Plural label name --> Staffs

Custom Object Definition Edit

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports. **Be careful when changing the name or label as it may affect existing integrations and merge templates.**

Label: Example: Account

Plural Label: Example: Accounts

Starts with vowel sound: ☐

The Object Name is used when referencing the object via the API.

Object Name: Example: Account

Description:

Context-Sensitive Help Setting: ☒ Open the standard Salesforce.com Help & Training window ☐ Open a window using a Visualforce page

Content Name:

A CRM APPLICATION FOR BANQUET HALL BOOKING

3. Enter Record Name --> Staff Name
4. Select Data Type as Text.
5. Select Allow reports.

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is called "Name" when referenced via the API.

Record Name **Example: Account Name**

Data Type **Warning:** If you plan to insert a high volume of records in this object, you may experience performance issues.

Optional Features

- ☒ Allow Reports
- ☐ Allow Activities
- ☐ Track Field History
- ☐ Allow in Chatter Groups
- ☐ Enable Licensing [i](#)

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Standard Object.

- ☒ Allow Sharing
- ☒ Allow Bulk API Access
- ☒ Allow Streaming API Access

6. Select Allow search.
7. Click on Save.

Search Status

When this setting is enabled, your users can find records of this object type when they search. [Learn more.](#)

☒ Allow Search

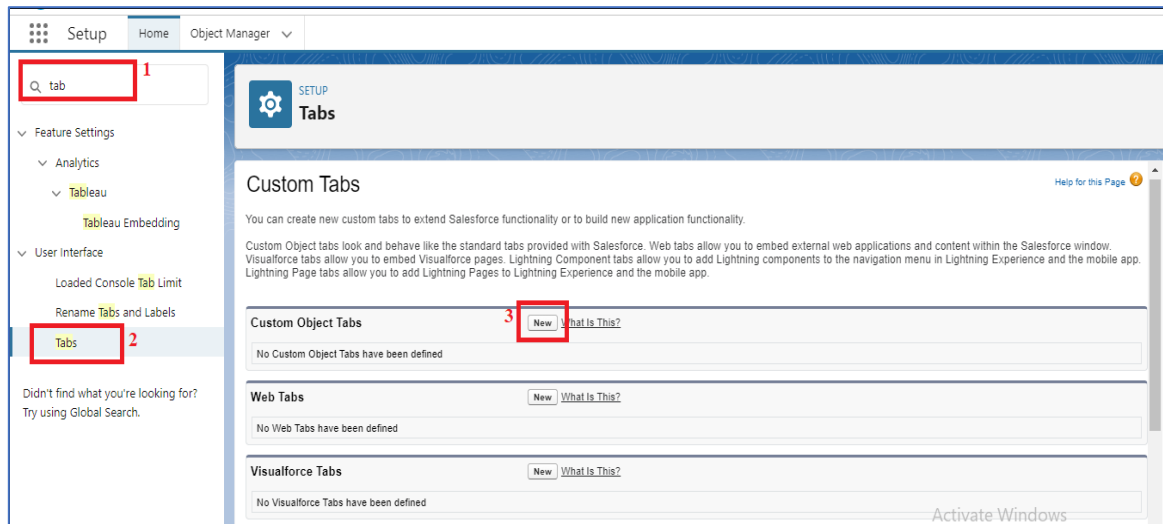
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Milestone 3

Tabs

Activity 1: Creating a tab for Banquet Hall Object

1. Go to the setup page --> type Tabs in Quick Find bar
2. Click on tabs



3. Click on New (under custom object tab).
4. Select Object(Banquet Hall) --> Select the tab style
5. Click on Next --> (Add to profiles page) keep it as default -->Click on Next (Add to Custom App) uncheck the include tab .
6. Make sure that the Append tab to users' existing personal customizations is checked.
7. Click save

The screenshot shows the 'Custom Tab Definition Edit' form. The 'Custom Object Tab Information' section contains the following fields:

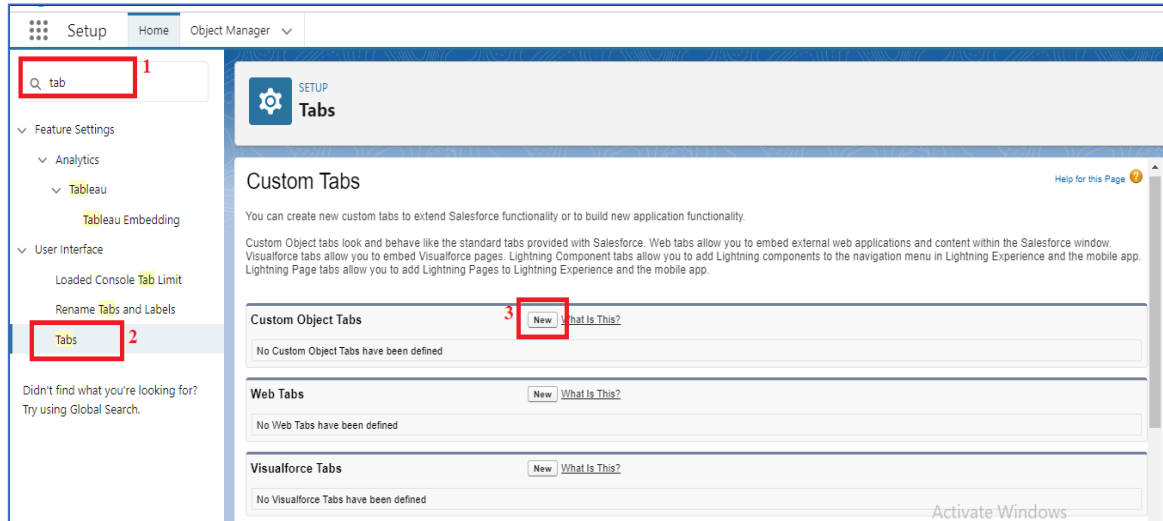
- Tab Label: Banquet Halls
- Object: Banquet Hall
- Tab Style: Desk (with a visual representation of the tab style)

Below this, there is an optional section for 'Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.' with a 'Splash Page Custom Link' dropdown set to '--None--'. There is also a text area for 'Enter a short description.' with the label 'Description'. At the bottom, there are 'Save' and 'Cancel' buttons.

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Activity 2: Creating a tab for Billing Object

1. Go to the setup page --> type Tabs in Quick Find bar
2. Click on tabs



3. Click on New (under custom object tab).
4. Select Object (Billing) --> Select the tab style
5. Click on Next --> (Add to profiles page) keep it as default --> Click on Next (Add to Custom App) uncheck the include tab.
6. Make sure that the Append tab to users' existing personal customizations is checked.
7. Click save

The screenshot shows the 'Custom Tab Definition Edit' form. The 'Custom Object Tab Information' section is expanded, showing the following fields:

- Tab Label: Billings
- Object: Billing
- Tab Style: Laptop (selected)

Below this, there is an optional section for 'Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.' The 'Splash Page Custom Link' is set to '--None--'.

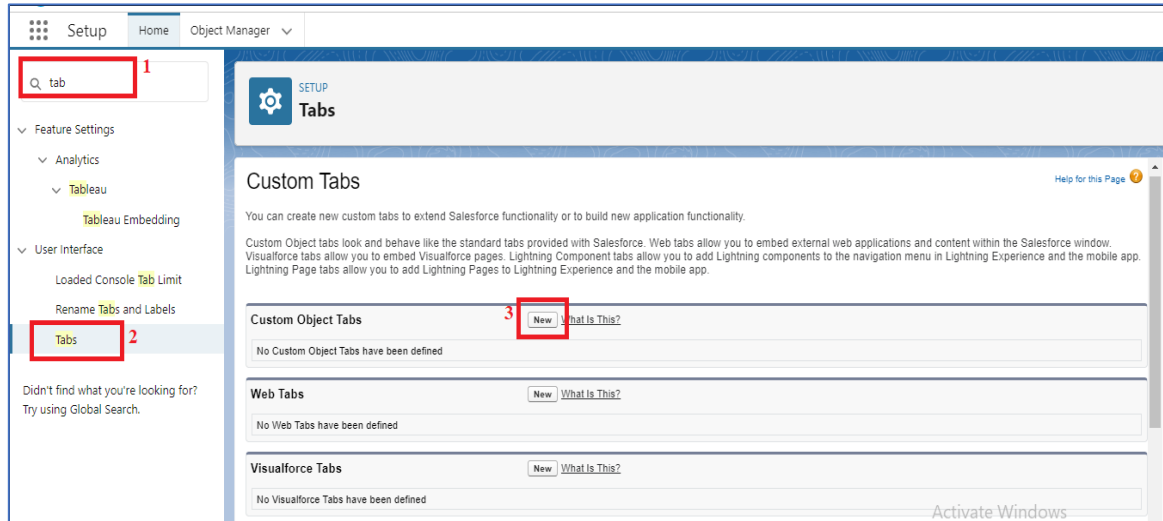
There is a text area for 'Enter a short description.' with the label 'Description'.

At the bottom, there are 'Save' and 'Cancel' buttons.

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Activity 3: Creating a tab for Staff Object



1. Go to the setup page --> type Tabs in Quick Find bar
2. Click on tabs



3. Click on New (under custom object tab).
4. Select Object (Staff) --> Select the tab style
5. Click on Next --> (Add to profiles page) keep it as default --> Click on Next (Add to Custom App) uncheck the include tab.
6. Make sure that the Append tab to users' existing personal customizations is checked.
7. Click save

Custom Tab Definition Edit

Custom Object Tab Information

Tab Label	Staffs
Object	Staff
Tab Style	 Star 

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.

Splash Page Custom Link --None--

Enter a short description.

Description

Save Cancel

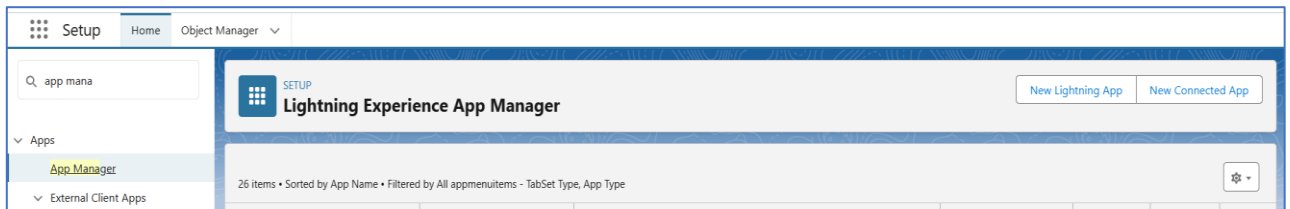
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Milestone 4

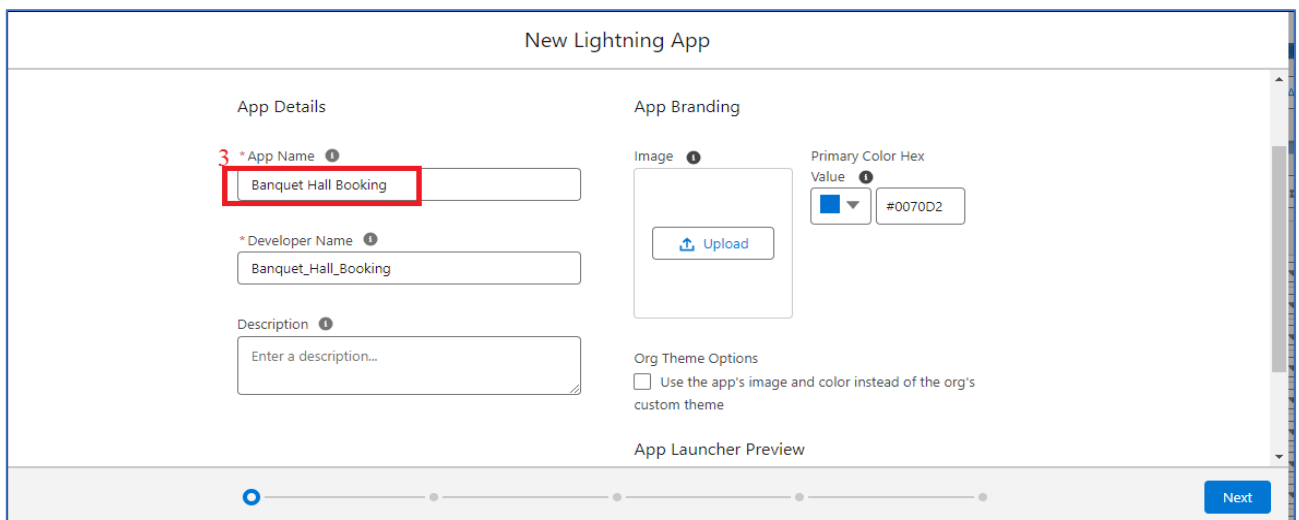
The Lightning App

Activity: Create a Lightning App for Banquet Hall Booking

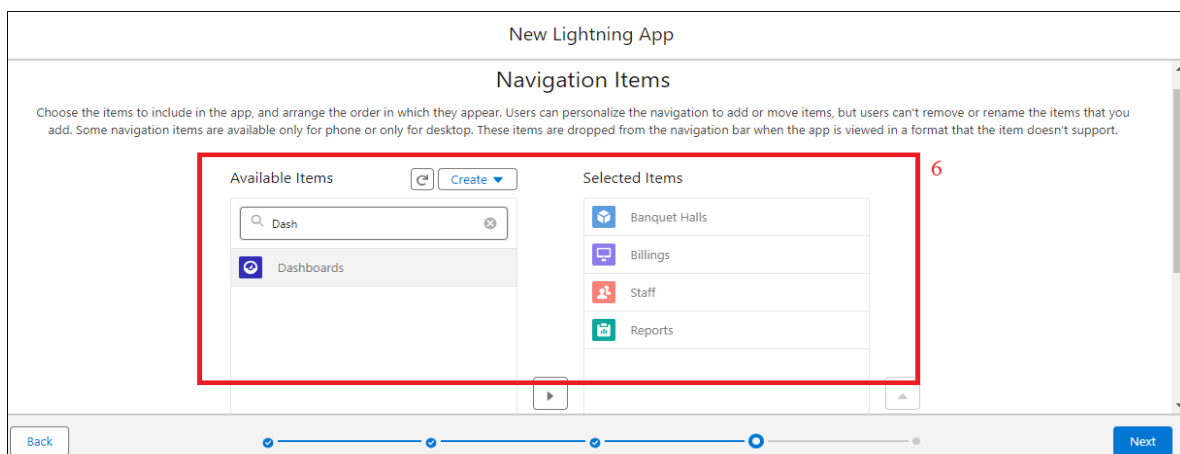
1. From Setup, enter App Manager in the Quick Find and select App Manager.
2. Click New Lightning App.



3. Enter Banquet Hall Booking as the App Name, then click next
4. Under App Options, leave the default selections and click next.
5. Under Utility Items, leave as is and click Next.

The screenshot shows the 'New Lightning App' configuration page. It is divided into two main sections: 'App Details' and 'App Branding'. In the 'App Details' section, the 'App Name' field is highlighted with a red box and contains the text 'Banquet Hall Booking'. Below it, the 'Developer Name' field contains 'Banquet_Hall_Booking' and the 'Description' field is empty. In the 'App Branding' section, there is an 'Image' upload button, a 'Primary Color Hex' field with the value '#0070D2', and an 'Org Theme Options' checkbox which is unchecked. At the bottom right, there is a 'Next' button.

6. From Available Items, select Banquet Halls, Billings, Staff, Reports, and Dashboards and move them to Selected Item and Click Next.

The screenshot shows the 'New Lightning App' configuration page, specifically the 'Navigation Items' section. It is titled 'Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.' There are two columns: 'Available Items' and 'Selected Items'. The 'Available Items' column contains 'Dashboards'. The 'Selected Items' column contains 'Banquet Halls', 'Billings', 'Staff', and 'Reports'. A red box highlights the 'Selected Items' column, and a red number '6' is next to it. At the bottom, there is a 'Back' button on the left and a 'Next' button on the right.

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7. From Available Profiles, select System Administrator and move it to Selected Profiles.
8. Click Save & Finish.

The screenshot shows the 'New Lightning App' setup interface for 'User Profiles'. The title 'New Lightning App' is at the top. Below it, 'User Profiles' is the main heading, followed by the instruction 'Choose the user profiles that can access this app.' The interface is divided into two main sections: 'Available Profiles' on the left and 'Selected Profiles' on the right. In the 'Available Profiles' section, there is a search bar with the text 'system' and a dropdown menu showing 'System Administrator'. A red box labeled '7' highlights this section. In the 'Selected Profiles' section, there is an empty box. At the bottom of the screen, there is a 'Back' button on the left and a 'Save & Finish' button on the right, which is highlighted with a red box and labeled '8'. A progress bar at the bottom indicates the current step in the setup process.

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Milestone 5

Fields

Object Name – Banquet Hall

Object	Field Name	Data Type	Required
Banquet Hall	Customer Name (Standard)	Text	Yes
	Timings	Picklist (Morning, Evening)	Yes
	Booking Date	Date	Yes
	Decoration Purpose	Picklist	Yes
	Food Menu	Picklist	Yes
	No of Visitors	Number	Yes
	Email	Email	
	Phone No	Phone	
	Archestra	Checkbox	
	DJ	Checkbox	
	Shehnai and Mridangam	Checkbox	
	Magician	Checkbox	
	Kolatam	Checkbox	

Field Name – Timings

1. Go to setup --> click on Object Manager --> type object name (Banquet Hall) in quick find box --> click on the Banquet Hall object.
2. Now click on "Fields & Relationships"
3. Click on New.
4. Select Data type as "picklist" and click Next.
5. Enter Field Label as "Timings".
6. Select Enter values, with each value separated by a new line in Values
7. Enter Picklist Values (Morning, Evening)
8. Select Required, always require a value in this field in order to save a record.

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9. Click on Next, Next and Save.

Banquet Hall Custom Field

Timings

Back to Banquet Hall

Validation Rules (0)

Help for this Page

Custom Field Definition Detail

EditSet Field-Level SecurityView Field AccessibilityWhere is this used?

Field Information

Field Label	Timings	Object Name	Banquet Hall
Field Name	Timings	Data Type	Picklist
API Name	Timings__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	DEEPAK DEEPAK, 6/1/2025, 10:35 PM	Modified By	DEEPAK DEEPAK, 6/1/2025, 10:35 PM

Values

NewReorderReplacePrintable ViewChart Colors

Delete SelectedDeactivate SelectedReplace Selected

Values Help

Action	Values	API Name	Default	Chart Colors	Modified By
<input type="checkbox"/> Edit Del Deactivate	Morning	Morning	<input type="checkbox"/>	Assigned dynamically	DEEPAK DEEPAK, 6/1/2025, 10:35 PM
<input type="checkbox"/> Edit Del Deactivate	Evening	Evening	<input type="checkbox"/>	Assigned dynamically	DEEPAK DEEPAK, 6/1/2025, 10:35 PM

Field Name – Booking Date

1. Go to setup --> click on Object Manager --> type object name (Banquet Hall) in quick find box --> click on the Banquet Hall object.
2. Now click on “Fields & Relationships”
3. Click on New.
4. Select Data type as “Date” and click Next.
5. Enter Field Label as “Booking Date”.
6. Select Required, always require a value in this field in order to save a record.
7. Click on Next, Next and Save.

Custom Field Definition Detail

EditSet Field-Level SecurityView Field AccessibilityWhere is this used?

Field Information

Field Label	Booking Date	Object Name	Banquet Hall
Field Name	Booking_Date	Data Type	Date
API Name	Booking_Date__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	DEEPAK DEEPAK, 6/1/2025, 10:35 PM	Modified By	DEEPAK DEEPAK, 6/1/2025, 10:35 PM

General Options

Required	<input checked="" type="checkbox"/>
Default Value	

A CRM APPLICATION FOR BANQUET HALL BOOKING

Field Name - Decoration Purpose

1. Go to setup --> click on Object Manager --> type object name (Banquet Hall) in quick find box --> click on the Banquet Hall object.
2. Now click on "Fields & Relationships"
3. Click on New.
4. Select Data type as "picklist" and click Next.
5. Enter Field Label as "Decoration Purpose".
6. Select Enter values, with each value separated by a new line in Values
7. Enter Picklist Values (Reception, Anniversary, Birthday, Other Events)
8. Select Required, always require a value in this field in order to save a record.
9. Click on Next, Next and Save.

Decoration Purpose

[Back to Banquet Hall](#)

Validation Rules [\(0\)](#)

Custom Field Definition Detail

[Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#) [Where is this used?](#)

Field Information

Field Label	Decoration Purpose	Object Name	Banquet Hall
Field Name	Decoration_Purpose	Data Type	Picklist
API Name	Decoration_Purpose__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	DEEPAK DEEPAK, 6/1/2025, 10:37 PM	Modified By	DEEPAK DEEPAK, 6/1/2025, 11:35 PM

General Options

Required	<input type="checkbox"/>
Default Value	1

Values					
<div><div>NewReorderReplacePrintable ViewChart Colors</div><div>Delete SelectedDeactivate SelectedReplace Selected</div></div>					
<div>Values Help?</div>					
Action	Values	API Name	Default	Chart Colors	Modified By
<input type="checkbox"/> Edit Del Deactivate	Reception	Reception	<input type="checkbox"/>	Assigned dynamically	DEEPAK DEEPAK, 6/1/2025, 10:37 PM
<input type="checkbox"/> Edit Del Deactivate	Anniversary	Anniversary	<input type="checkbox"/>	Assigned dynamically	DEEPAK DEEPAK, 6/1/2025, 10:37 PM
<input type="checkbox"/> Edit Del Deactivate	Birthday	Birthday	<input type="checkbox"/>	Assigned dynamically	DEEPAK DEEPAK, 6/1/2025, 10:37 PM
<input type="checkbox"/> Edit Del Deactivate	Other Events	Other Events	<input type="checkbox"/>	Assigned dynamically	DEEPAK DEEPAK, 6/1/2025, 10:37 PM

Field Name - Food Menu

1. Go to setup --> click on Object Manager --> type object name (Banquet Hall) in quick find box --> click on the Banquet Hall object.
2. Now click on "Fields & Relationships"
3. Click on New.
4. Select Data type as "picklist" and click Next.

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5. Enter Field Label as "Food Menu".
6. Select Enter values, with each value separated by a new line in Values
7. Enter Picklist Values (Veg, Special Veg, Non-Veg)
8. Select Required, always require a value in this field in order to save a record.
9. Click on Next, Next and Save.

Food Menu
[Back to Banquet Hall](#)

[Validation Rules \(0\)](#)

Custom Field Definition Detail [Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#) [Where is this used?](#)

Field Information

Field Label	Food Menu	Object Name	Banquet Hall
Field Name	Food_Menu	Data Type	Picklist
API Name	Food_Menu__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	DEEPAK DEEPAK, 6/1/2025, 10:38 PM	Modified By	DEEPAK DEEPAK, 6/1/2025, 10:38 PM

General Options

Required	<input checked="" type="checkbox"/>
Default Value	i

Values						
New Reorder Replace Printable View Chart Colors Values Help						
Delete Selected Deactivate Selected Replace Selected						
<input type="checkbox"/> Action	Values	API Name	Default	Chart Colors	Modified By	
<input type="checkbox"/> Edit Del Deactivate	Veg	Veg	<input type="checkbox"/>	Assigned dynamically	DEEPAK DEEPAK, 6/1/2025, 10:38 PM	
<input type="checkbox"/> Edit Del Deactivate	Special Veg	Special Veg	<input type="checkbox"/>	Assigned dynamically	DEEPAK DEEPAK, 6/1/2025, 10:38 PM	
<input type="checkbox"/> Edit Del Deactivate	Non-Veg	Non-Veg	<input type="checkbox"/>	Assigned dynamically	DEEPAK DEEPAK, 6/1/2025, 10:38 PM	

Field Name – No of Visitors

1. Go to setup --> click on Object Manager --> type object name (Banquet Hall) in quick find box --> click on the Banquet Hall object.
2. Now click on "Fields & Relationships"
3. Click on New.
4. Select Data type as "Number" and click Next.
5. Enter Field Label as "No of Visitors".
6. Select Required, always require a value in this field in order to save a record.
7. Click on Next, Next and Save.

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No of Visitors

[Back to Banquet Hall](#)

[Validation Rules \(0\)](#)

Custom Field Definition Detail

[Edit](#)[Set Field-Level Security](#)[View Field Accessibility](#)[Where is this used?](#)

Field Information	
Field Label	No of Visitors
Field Name	No_of_Visitors
API Name	No_of_Visitors__c
Description	
Help Text	
Data Owner	
Field Usage	
Data Sensitivity Level	
Compliance Categorization	
Created By	DEEPAK DEEPAK, 6/1/2025, 10:40 PM
Modified By	DEEPAK DEEPAK, 6/1/2025, 10:40 PM

Field Name – Email

1. Go to setup --> click on Object Manager --> type object name (Banquet Hall) in quick find box --> click on the Banquet Hall object.
2. Now click on "Fields & Relationships"
3. Click on New.
4. Select Data type as "Email" and click Next.
5. Enter Field Label as "Email".
6. Click on Next, Next and Save.

Banquet Hall Custom Field

Email

[Back to Banquet Hall](#)

[Validation Rules \(0\)](#)

Custom Field Definition Detail

[Edit](#)[Set Field-Level Security](#)[View Field Accessibility](#)[Where is this used?](#)

Field Information	
Field Label	Email
Field Name	Email
API Name	Email__c
Description	
Help Text	
Data Owner	
Field Usage	
Data Sensitivity Level	
Compliance Categorization	
Created By	DEEPAK DEEPAK, 6/1/2025, 10:41 PM
Modified By	DEEPAK DEEPAK, 6/2/2025, 12:04 AM

Field Name – Phone No

1. Go to setup --> click on Object Manager --> type object name (Banquet Hall) in quick find box --> click on the Banquet Hall object.
2. Now click on "Fields & Relationships"
3. Click on New.

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4. Select Data type as "Phone" and click Next.
5. Enter Field Label as "Phone No".
6. Click on Next, Next and Save.

Banquet Hall Custom Field

Phone No

[Back to Banquet Hall](#)

Validation Rules [0]

Custom Field Definition Detail

EditSet Field-Level SecurityView Field AccessibilityWhere is this used?

Field Information

Field Label	Phone No	Object Name	Banquet Hall
Field Name	Phone_No	Data Type	Phone
API Name	Phone_No__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	DEEPAK DEEPAK, 6/1/2025, 10:41 PM	Modified By	DEEPAK DEEPAK, 6/1/2025, 10:41 PM

Field Name – Archestra

1. Go to setup --> click on Object Manager --> type object name (Banquet Hall) in quick find box --> click on the Banquet Hall object.
2. Now click on "Fields & Relationships"
3. Click on New.
4. Select Data type as "Cheque Box" and click Next.
5. Enter Field Label as "Archestra".
6. Click on Next, Next and Save.

Archestra

[Back to Banquet Hall](#)

Validation Rules [0]

Custom Field Definition Detail

EditSet Field-Level SecurityView Field AccessibilityWhere is this used?

Field Information

Field Label	Archestra	Object Name	Banquet Hall
Field Name	Archestra	Data Type	Checkbox
API Name	Archestra__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	DEEPAK DEEPAK, 6/1/2025, 10:42 PM	Modified By	DEEPAK DEEPAK, 6/1/2025, 10:42 PM

A CRM APPLICATION FOR BANQUET HALL BOOKING

Field Name – DJ

1. Go to setup --> click on Object Manager --> type object name (Banquet Hall) in quick find box --> click on the Banquet Hall object.
2. Now click on "Fields & Relationships"
3. Click on New.
4. Select Data type as "Cheque Box" and click Next.
5. Enter Field Label as "DJ".
6. Click on Next, Next and Save.

DJ
[Back to Banquet Hall](#)

Validation Rules [0]

Custom Field Definition Detail

EditSet Field-Level SecurityView Field AccessibilityWhere is this used?

Field Information	
Field Label	DJ
Field Name	DJ
API Name	DJ__c
Description	
Help Text	
Data Owner	
Field Usage	
Data Sensitivity Level	
Compliance Categorization	
Created By	DEEPAK DEEPAK, 6/1/2025, 10:42 PM
Modified By	DEEPAK DEEPAK, 6/1/2025, 10:53 PM

Field Name - Shenai and Mridangam

1. Go to setup --> click on Object Manager --> type object name (Banquet Hall) in quick find box --> click on the Banquet Hall object.
2. Now click on "Fields & Relationships"
3. Click on New.
4. Select Data type as "Cheque Box" and click Next.
5. Enter Field Label as "Shenai and Mridangam".
6. Click on Next, Next and Save.

A CRM APPLICATION FOR BANQUET HALL BOOKING

Shenai and Mridangam
[Back to Banquet Hall](#)

Validation Rules (0)

Custom Field Definition Detail

EditSet Field-Level SecurityView Field AccessibilityWhere is this used?

Field Information

Field Label	Shenai and Mridangam	Object Name	Banquet Hall
Field Name	Shenai_and_Mridangam	Data Type	Checkbox
API Name	Shenai_and_Mridangam__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	DEEPAK DEEPAK, 6/1/2025, 10:44 PM	Modified By	DEEPAK DEEPAK, 6/1/2025, 10:44 PM

Field Name – Magician

1. Go to setup --> click on Object Manager --> type object name (Banquet Hall) in quick find box --> click on the Banquet Hall object.
2. Now click on "Fields & Relationships"
3. Click on New.
4. Select Data type as "Cheque Box" and click Next.
5. Enter Field Label as "Magician".
6. Click on Next, Next and Save.

Magician
[Back to Banquet Hall](#)

Validation Rules (0)

Custom Field Definition Detail

EditSet Field-Level SecurityView Field AccessibilityWhere is this used?

Field Information

Field Label	Magician	Object Name	Banquet Hall
Field Name	Magician	Data Type	Checkbox
API Name	Magician__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	DEEPAK DEEPAK, 6/1/2025, 10:45 PM	Modified By	DEEPAK DEEPAK, 6/1/2025, 10:45 PM

Field Name – Kolatam

1. Go to setup --> click on Object Manager --> type object name (Banquet Hall) in quick find box --> click on the Banquet Hall object.
2. Now click on "Fields & Relationships"
3. Click on New.
4. Select Data type as "Cheque Box" and click Next.
5. Enter Field Label as "Kolatam".

A CRM APPLICATION FOR BANQUET HALL BOOKING

6. Click on Next, Next and Save.

Kolatam
[Back to Banquet Hall](#)
Validation Rules [0]

Custom Field Definition Detail
Edit
Set Field-Level Security
View Field Accessibility
Where is this used?

Field Information

Field Label	Kolatam	Object Name	Banquet Hall
Field Name	Kolatam	Data Type	Checkbox
API Name	Kolatam__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	DEEPAK DEEPAK, 6/1/2025, 10:45 PM	Modified By	DEEPAK DEEPAK, 6/1/2025, 10:45 PM

Object Name - Billing

Object	Field Name	Data Type	Required
Billing	Billing No(Standard)	Auto Number Format: BILL-{0000}	Yes
	Customer Name	Master Detail Relationship with Banquet Hall	
	Email	Email	Yes
	Food Amount per Plate	Formula	
	Food Amount	Formula	
	Decoration Amount	Formula	
	Archestra Amount	Formula	
	DJ Amount	Formula	
	Magician Amount	Formula	

A CRM APPLICATION FOR BANQUET HALL BOOKING

	Shehnai and Mridangam Amount	Formula	
	Kolatham Amount	Formula	
	Total Amount	Formula	

Field Name – Customer Name

1. Go to the Setup page --> click on Object manager --> type object name (Billing) in the quick find bar--> click on the object.
2. Click on fields & relationship
3. Click on New.
4. Select "Master Detail relationship" as data type and click Next.
5. Select the related object "Banquet Hall".
6. Click on Next
7. Give Field Label as "Customer Name".
8. Click on Next --> Next --> Next --> Save.

Customer Name

Back to Billing

Validation Rules (0)

Custom Field Definition Detail

Edit
Set Field-Level Security
View Field Accessibility
Where is this used?

Field Information

Field Label	Customer Name	Object Name	Billing
Field Name	Customer_Name	Data Type	Master-Detail
API Name	Customer_Name__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	DEEPAK DEEPAK, 6/1/2025, 10:52 PM	Modified By	DEEPAK DEEPAK, 6/1/2025, 10:52 PM

Master-Detail Options

Related To	Banquet Hall	Child Relationship Name	Billings
Related List Label	Billings		
Sharing Setting	Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.		
Reparentable Master Detail	<input type="checkbox"/>		

Field Name – Email

1. Go to setup --> click on Object Manager --> type object name (Banquet Hall) in quick find box --> click on the Banquet Hall object.
2. Now click on "Fields & Relationships"

A CRM APPLICATION FOR BANQUET HALL BOOKING

3. Click on New.
4. Select Data type as "Email" and click Next.
5. Enter Field Label as "Email".
6. Select Required, always require a value in this field in order to save a record.
7. Click on Next, Next and Save.

Email

[Back to Billing](#)

[Validation Rules \(0\)](#)

Custom Field Definition Detail [Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#) [Where is this used?](#)

Field Information	
Field Label	Email
Field Name	Email
API Name	Email__c
Description	
Help Text	
Data Owner	
Field Usage	
Data Sensitivity Level	
Compliance Categorization	
Created By	DEEPAK DEEPAK, 6/2/2025, 12:05 AM
Modified By	DEEPAK DEEPAK, 6/2/2025, 12:05 AM

General Options	
Required	<input checked="" type="checkbox"/>
Unique	<input type="checkbox"/>
External ID	<input type="checkbox"/>
Default Value	

Field Name – Archestra Amount

1. Go to setup --> click on Object Manager --> type object name (Billing) in quick find box--> click on the Billing object.
2. Now click on "Fields & Relationships"
3. Click on New.
4. Select Data type as "Formula" and click Next.
5. Enter field label Archestra Amount
6. Select formula return type Currency, Click Next
7. Create and insert Advance formula: IF (Customer_Name__r. Archestra__c = TRUE, 50000, 0)
8. Click Next, Next, then Save.

A CRM APPLICATION FOR BANQUET HALL BOOKING

Archestra Amount

[Back to Billing](#)

Custom Field Definition Detail

Edit

Set Field-Level Security

View Field Accessibility

Where is this used?

Field Information

Field Label	Archestra Amount	Object Name	Billing
Field Name	Archestra_Amount		
API Name	Archestra_Amount__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	DEEPAK DEEPAK, 6/1/2025, 11:00 PM	Modified By	DEEPAK DEEPAK, 6/1/2025, 11:00 PM

Formula Options

Data Type	Formula 
Decimal Places	2
IF(Customer_Name__r.Archestra__c = TRUE, 50000, 0)	

Field Name - DJ Amount

1. Go to setup --> click on Object Manager --> type object name (Billing) in quick find box--> click on the Billing object.
2. Now click on "Fields & Relationships"
3. Click on New.
4. Select Data type as "Formula" and click Next.
5. Enter field label DJ Amount
6. Select formula return type Currency, Click Next
7. Create and insert Advance formula: IF (Customer_Name__r.DJ__c = TRUE, 70000, 0)
8. Click Next, Next, then Save.

A CRM APPLICATION FOR BANQUET HALL BOOKING

DJ Amount

[Back to Billing](#)

Custom Field Definition Detail

Edit

Set Field-Level Security


View Field Accessibility

Where is this used?

Field Information

Field Label	DJ Amount	Object Name	Billing
Field Name	DJ_Amount		
API Name	DJ_Amount__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	DEEPAK DEEPAK, 6/1/2025, 11:01 PM	Modified By	DEEPAK DEEPAK, 6/1/2025, 11:01 PM

Formula Options

Data Type	Formula 
Decimal Places	2

IF(Customer_Name__r.DJ__c = TRUE, 70000, 0)

Field Name - Magician Amount

1. Go to setup --> click on Object Manager --> type object name (Billing) in quick find box --> click on the Billing object.
2. Now click on "Fields & Relationships"
3. Click on New.
4. Select Data type as "Formula" and click Next.
5. Enter field label Magician Amount
6. Select formula return type Currency, Click Next
7. Create and insert Advance formula: IF (Customer_Name__r. Magician__c , 15000, 0)
8. Click Next, Next, then Save.

Magician Amount

[Back to Billing](#)

Custom Field Definition Detail

Edit

Set Field-Level Security

View Field Accessibility

Where is this used?

Field Information

Field Label	Magician Amount	Object Name	Billing
Field Name	Magician_Amount		
API Name	Magician_Amount__c		
Description			
Help Text			
Data Owner			
Field Usage	Billing Custom Field: Magician Amount ~ Salesforce - Developer Edition		
Data Sensitivity Level			
Compliance Categorization			
Created By	DEEPAK DEEPAK, 6/1/2025, 11:02 PM	Modified By	DEEPAK DEEPAK, 6/1/2025, 11:02 PM

Formula Options

Data Type	Formula 
Decimal Places	2

IF(Customer_Name__r.Magician__c , 15000, 0)

A CRM APPLICATION FOR BANQUET HALL BOOKING

Field Name - Shenai and Mridangam Amount

1. Go to setup --> click on Object Manager --> type object name (Billing) in quick find box --> click on the Billing object.
2. Now click on "Fields & Relationships"
3. Click on New.
4. Select Data type as "Formula" and click Next.
5. Enter field label Shehnai and Mridangam Amount
6. Select formula return type Currency, Click Next
7. Create and insert Advance formula: IF (Customer_Name__r.Shenai_and_Mridangam__c = TRUE, 25000, 0)
8. Click Next, Next, then Save.

Shenai and Mridangam Amount

[Back to Billing](#)


Custom Field Definition Detail

[Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#) [Where is this used?](#)

Field Information

Field Label	Shenai and Mridangam Amount	Object Name	Billing
Field Name	Shenai_and_Mridangam_Amount		
API Name	Shenai_and_Mridangam_Amount__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity	Billing Custom Field: Shenai and Mridangam Amount ~ Salesforce - Developer Edition		
Compliance Categorization			
Created By	DEEPAK DEEPAK, 6/1/2025, 11:04 PM	Modified By	DEEPAK DEEPAK, 6/1/2025, 11:04 PM

Formula Options

Data Type	Formula 
Decimal Places	2

IF(Customer_Name__r.Shenai_and_Mridangam__c = TRUE, 25000, 0)

Field Name - Kolatam Amount

1. Go to setup --> click on Object Manager --> type object name (Billing) in quick find box--> click on the Billing object.
2. Now click on "Fields & Relationships"
3. Click on New.
4. Select Data type as "Formula" and click Next.
5. Enter field label Kolatam Amount.
6. Select formula return type Currency, Click Next.
7. Create and insert Advance formula: IF(Customer_Name__r.Kolatam__c , 15000, 0)

A CRM APPLICATION FOR BANQUET HALL BOOKING

8. Click Next, Next, then Save.

Kolatam Amount
[Back to Billing](#)

Custom Field Definition Detail
[Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#) [Where is this used?](#)

Field Information

Field Label	Kolatam Amount	Object Name	Billing
Field Name	Kolatam_Amount		
API Name	Kolatam_Amount__c		
Description			
Help Text			
Data Owner			
Field Usage	Billing Custom Field: Kolatam Amount ~ Salesforce - Developer Edition		
Compliance Categorization			
Created By	DEEPAK DEEPAK, 6/1/2025, 11:05 PM	Modified By	DEEPAK DEEPAK, 6/1/2025, 11:05 PM

Formula Options

Data Type	Formula
Decimal Places	2

IF(Customer_Name__r.Kolatam__c , 15000, 0)

Field Name - Food Amount per Plate

1. Go to setup --> click on Object Manager --> type object name(Billing) in quick find box --> click on the Billing object.
2. Now click on "Fields & Relationships"
3. Click on New.
4. Select Data type as "Formula" and click Next.
5. Enter field label Food Amount per Plate
6. Select formula return type Currency, Click Next
7. Create and insert Advance formula as follows:
CASE (Customer_Name__r.Food_Menu__c , 'Veg', 450,
'Special Veg', 550,
'Non-Veg', 550, 650)
8. Click Next, Next, then Save.

A CRM APPLICATION FOR BANQUET HALL BOOKING

Food Amount per Plate

[Back to Billing](#)

Custom Field Definition Detail

Edit

Set Field-Level Security


View Field Accessibility

Where is this used?

Field Information

Field Label	Food Amount per Plate	Object Name	Billing
Field Name	Food_Amount_per_Plate		
API Name	Food_Amount_per_Plate__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	DEEPAK DEEPAK, 6/1/2025, 11:06 PM	Modified By	DEEPAK DEEPAK, 6/1/2025, 11:06 PM

Formula Options

Data Type	Formula 
Decimal Places	2

CASE(Customer_Name__r.Food_Menu__c , 'Veg', 450,
'Special Veg', 550,

Field Name - Food Amount

1. Go to setup --> click on Object Manager --> type object name(Billing) in quick find box--> click on the Billing object.
2. Now click on "Fields & Relationships"
3. Click on New.
4. Select Data type as "Formula" and click Next.
5. Enter field label Food Amount.
6. Select formula return type Currency, Click Next
7. Create and insert Advance formula:
$$\text{Food_Amount_per_Plate_c} * \text{Customer_Name_r.No_of_Visitors_c}$$
8. Click Next, Next, then Save.

Food Amount

[Back to Billing](#)

Custom Field Definition Detail

Edit

Set Field-Level Security


View Field Accessibility

Where is this used?

Field Information

Field Label	Food Amount	Object Name	Billing
Field Name	Food_Amount		
API Name	Food_Amount__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	DEEPAK DEEPAK, 6/1/2025, 11:08 PM	Modified By	DEEPAK DEEPAK, 6/1/2025, 11:08 PM

Formula Options

Data Type	Formula 
Decimal Places	2

Food_Amount_per_Plate__c * Customer_Name__r.No_of_Visitors__c

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Field Name - Decoration Amount

1. Go to setup --> click on Object Manager --> type object name (Billing) in quick find box--> click on the Billing object.
2. Now click on "Fields & Relationships"
3. Click on New.
4. Select Data type as "Formula" and click Next.
5. Enter field label Decoration Amount
6. Select formula return type Currency, Click Next
7. Create and insert Advance formula:
CASE(Customer_Name__r.Decoration_Purpose__c ,'Marriage', 50000,
'Reception', 60000,
'Anniversary', 30000,
'Birthday', 25000,
'Other Events', 20000, 0)
8. Click Next, Next, then Save.

Decoration Amount

[Back to Billing](#)

Custom Field Definition Detail

[Edit](#)[Set Field-Level Security](#)[View Field Accessibility](#)[Where is this used?](#)

Field Information

Field Label	Decoration Amount	Object Name	Billing
Field Name	Decoration_Amount		
API Name	Decoration_Amount__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	DEEPAK DEEPAK, 6/1/2025, 11:09 PM	Modified By	DEEPAK DEEPAK, 6/1/2025, 11:09 PM

Formula Options

Data Type	Formula
Decimal Places	2

CASE(Customer_Name__r.Decoration_Purpose__c ,'Marriage', 50000,
'Reception', 60000,

Field Name – Total Bill Amount

1. Go to setup --> click on Object Manager --> type object name (Billing) in quick find box--> click on the Billing object.
2. Now click on "Fields & Relationships"

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3. Click on New.
4. Select Data type as "Formula" and click Next.
5. Enter field label Decoration Amount
6. Select formula return type Currency, Click Next
7. Create and insert Advance formula:
Decoration_Amount_c + Food_Amountc + DJ_Amountc + Archestra_Amountc +
Kolatam_Amountc + Magician_Amountc+ Shehnai_and_Mridangam_Amount_c
8. Click Next, Next, then Save.

Object Name – Staff

Staff	Staff Name (Standard)	Text	Yes
	Position	Text	
	Salary	Currency	
	Phone No	Phone	
	Date of Joining	Date	

Field Name - Position

1. Go to setup --> click on Object Manager --> type object name (Banquet Hall) in quick find box --> click on the Banquet Hall object.
2. Now click on "Fields & Relationships"
3. Click on New.

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4. Select Data type as "Text" and click Next.
5. Enter the Field Label as "Position".
6. Click on Next, Next and Save.

The screenshot shows the 'Staff Custom Field' configuration page for a field named 'Position'. The page has a header with 'Staff Custom Field' and 'Position', and a 'Back to Staff' link. Below the header is a 'Validation Rules' section with a '0' icon. The main section is 'Custom Field Definition Detail', which includes tabs for 'Edit', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'Field Information' section contains a table with the following data:

Field Label	Position	Object Name	Staff
Field Name	Position	Data Type	Text
API Name	Position__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	DEEPAK DEEPAK, 6/1/2025, 11:11 PM	Modified By	DEEPAK DEEPAK, 6/1/2025, 11:11 PM

The 'General Options' section includes checkboxes for 'Required', 'Unique', 'Case Sensitive', and 'External ID', all of which are currently unchecked.

Field Name - Salary

1. Go to setup --> click on Object Manager --> type object name (Banquet Hall) in quick find box --> click on the Banquet Hall object.
2. Now click on "Fields & Relationships"
3. Click on New.
4. Select Data type as "Currency" and click Next.
5. Enter the Field Label as "Salary".
6. Click on Next, Next and Save.

The screenshot shows the 'Custom Field Definition Detail' page for a field named 'Salary'. The page has a header with 'Custom Field Definition Detail' and 'Salary', and a 'Back to Staff' link. Below the header is a 'Validation Rules' section with a '0' icon. The main section is 'Custom Field Definition Detail', which includes tabs for 'Edit', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'Field Information' section contains a table with the following data:

Field Label	Salary	Object Name	Staff
Field Name	Salary	Data Type	Currency
API Name	Salary__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	DEEPAK DEEPAK, 6/1/2025, 11:11 PM	Modified By	DEEPAK DEEPAK, 6/1/2025, 11:11 PM

The 'General Options' section includes checkboxes for 'Required' and 'Default Value', both of which are currently unchecked.

The 'Currency Options' section includes a table with the following data:

Length	18
Decimal Places	0

Field Name - Phone No

1. Go to setup --> click on Object Manager --> type object name (Banquet Hall) in quick find box --> click on the Banquet Hall object.
2. Now click on "Fields & Relationships"
3. Click on New.

A CRM APPLICATION FOR BANQUET HALL BOOKING

4. Select Data type as "Phone" and click Next.
5. Enter the Field Label as "Phone No".
6. Click on Next, Next and Save.

Staff Custom Field

Phone No

[Back to Staff](#)

Validation Rules (0)

Custom Field Definition Detail

EditSet Field-Level SecurityView Field AccessibilityWhere is this used?

Field Information

Field Label	Phone No	Object Name	Staff
Field Name	Phone_No	Data Type	Phone
API Name	Phone_No__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	DEEPAK DEEPAK, 6/1/2025, 11:12 PM	Modified By	DEEPAK DEEPAK, 6/1/2025, 11:12 PM

General Options

Required☐

Default Value

Field Name - Date of Joining

1. Go to setup --> click on Object Manager --> type object name (Banquet Hall) in quick find box --> click on the Banquet Hall object.
2. Now click on "Fields & Relationships"
3. Click on New.
4. Select Data type as "Phone" and click Next.
5. Enter the Field Label as "Phone No".
6. Click on Next, Next and Save.

Staff Custom Field

Date of Joining

[Back to Staff](#)

Validation Rules (0)

Custom Field Definition Detail

EditSet Field-Level SecurityView Field AccessibilityWhere is this used?

Field Information

Field Label	Date of Joining	Object Name	Staff
Field Name	Date_of_Joining	Data Type	Date
API Name	Date_of_Joining__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	DEEPAK DEEPAK, 6/1/2025, 11:13 PM	Modified By	DEEPAK DEEPAK, 6/1/2025, 11:13 PM

General Options

Required☐

Default Value

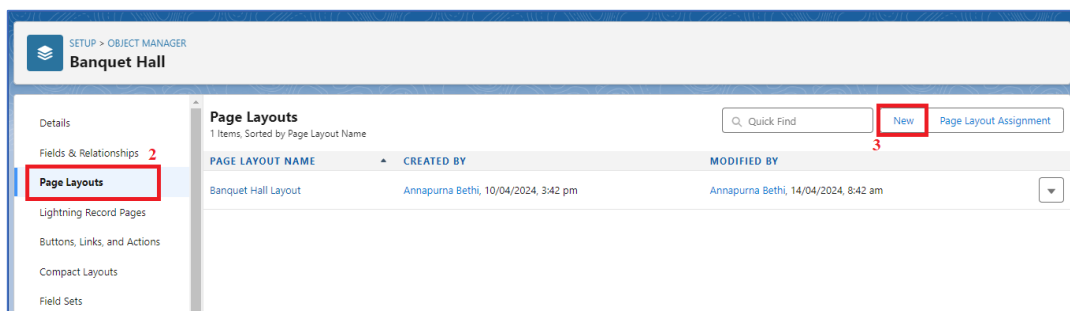
A CRM APPLICATION FOR BANQUET HALL BOOKING

Milestone 6

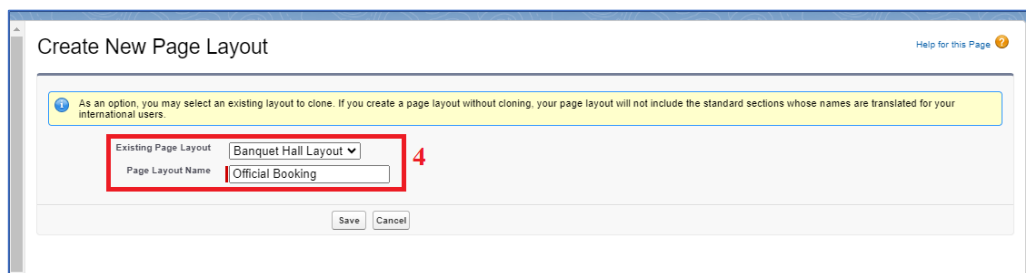
Creation of Page Layouts

Activity 1: To create a Page Layout in Banquet Hall Object for Official Booking

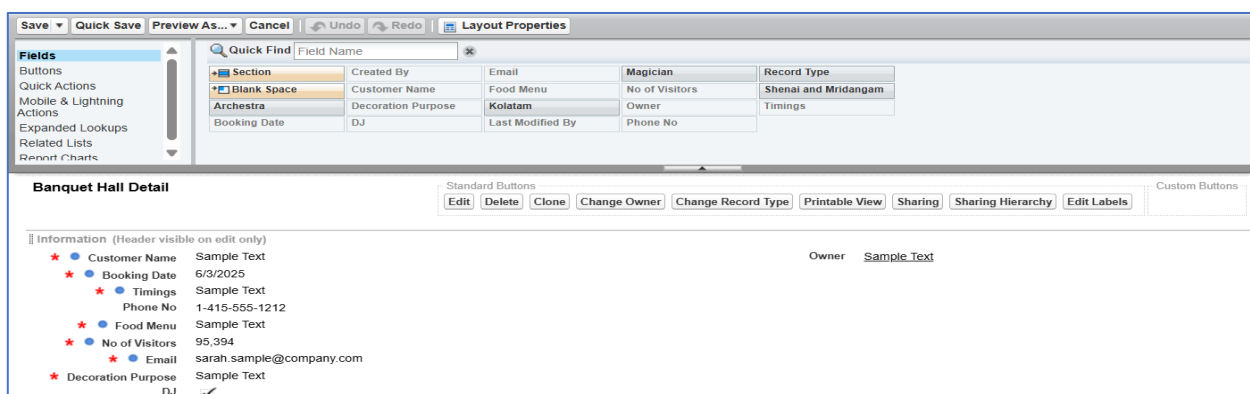
1. Go to setup --> click on Object Manager --> type object name(Banquet Hall) in quick find box --> click on the Banquet Hall object.
2. Click on the Page Layouts
3. Click on New.



4. Enter details as
 - Existing Page Layout: Select Banquet Hall Layout
 - Page Layout Name: Official Booking
 - Click on Save



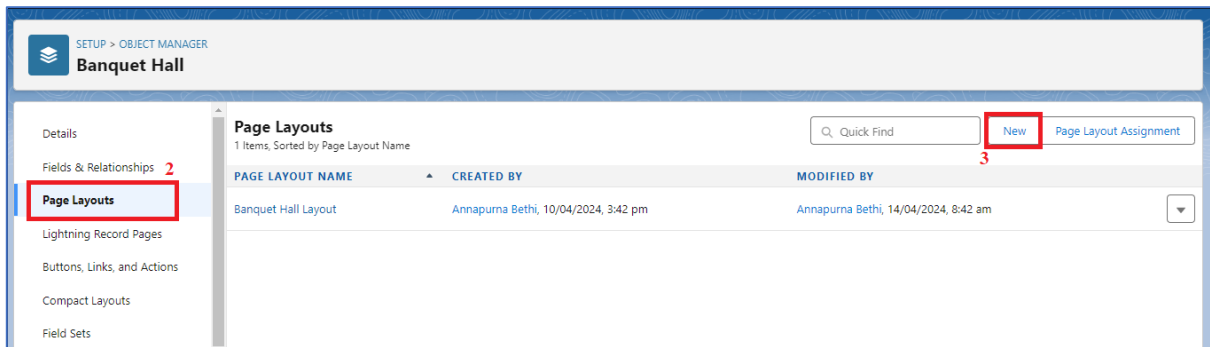
5. Drag and arrange the field as shown below



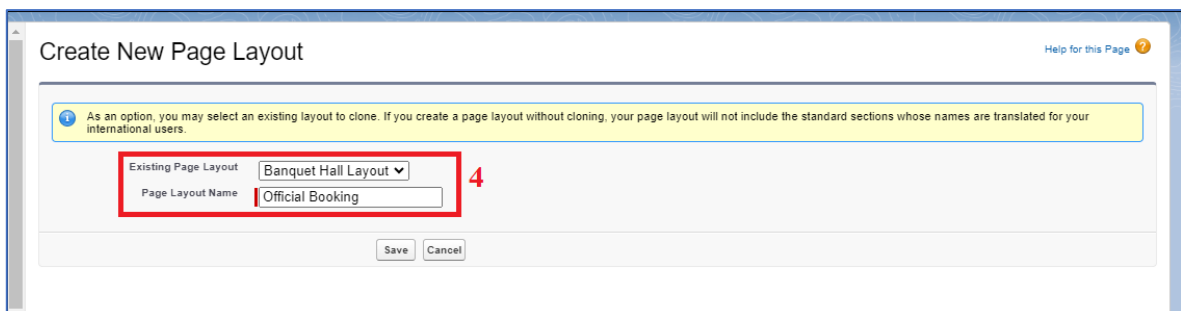
A CRM APPLICATION FOR BANQUET HALL BOOKING

Activity 2: To create a Page Layout in Banquet Hall Object for Celebrations

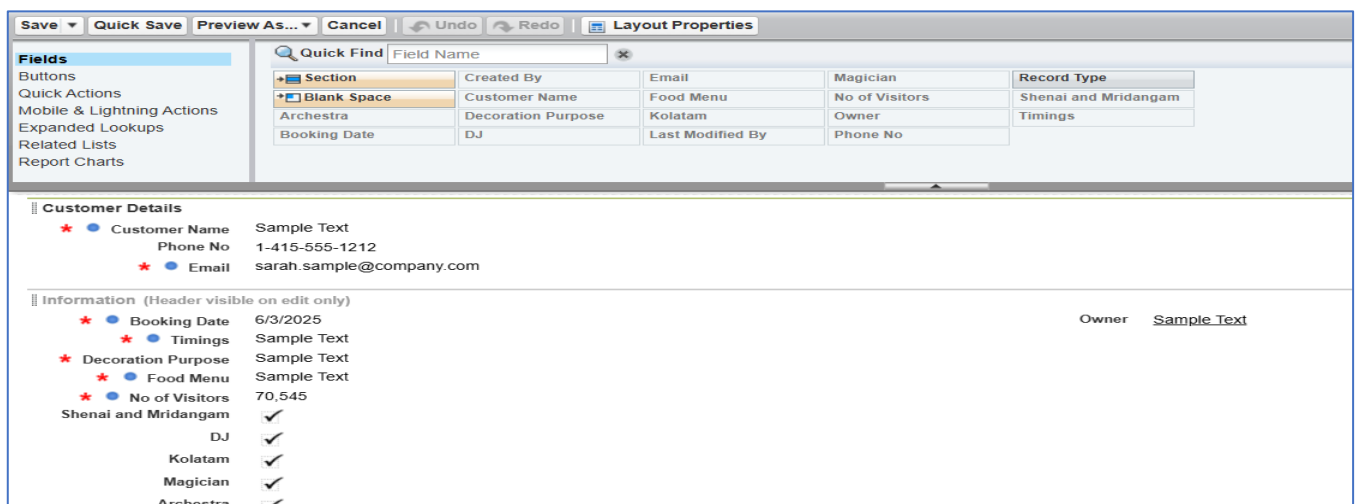
1. Go to setup --> click on Object Manager --> type object name (Banquet Hall) in quick find box--> click on the Banquet Hall object.
2. Click on the Page Layouts
3. Click on New.



4. Enter details as
 - Existing Page Layout: Select Banquet Hall Layout
 - Page Layout Name: Celebrations
 - Click on Save



5. Drag and arrange the field as shown below



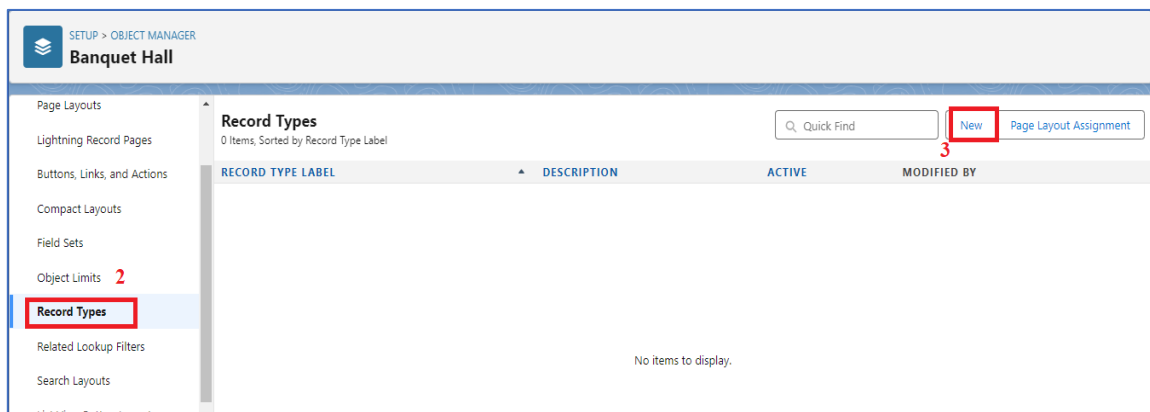
A CRM APPLICATION FOR BANQUET HALL BOOKING

Milestone 7

Creation of Record Types

Activity 1: To create a Record Type for Official Booking in Banquet Hall Object

1. Go to setup --> click on Object Manager --> type object name(Banquet Hall) in quick find box --> click on the Banquet Hall object.
2. Click on the Record Types.
3. Click on New.



4. Enter the details: For Record Types
 - Existing Record Type: Master
 - Record Type Label: Official Booking
 - Record Type Name: Official_Booking
 - Active: Tick checkbox

The screenshot shows the 'Step 1. Enter the details' form for creating a new Record Type. The form fields are: Existing Record Type (dropdown set to --Master--), Record Type Label (text field with 'Official Booking'), Record Type Name (text field with 'Official_Booking'), Description (text field with 'It is for Official Meetings, lunch, gatherings'), and Active (checkbox checked). A red box highlights the form fields, and a red '4' is next to it.

Select Make Available to give users assigned to this profile the ability to create and clone records of this record type, or assign this record type to existing records. To make the new record type the default for a profile, select Make Default. Users assigned to this record type can still view and edit records associated with record types not available for their profiles.

Profile Name	Record Types Currently Available	<input checked="" type="checkbox"/> Make Available	<input type="checkbox"/> Make Default
Analytics Cloud Integration User		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User		<input checked="" type="checkbox"/>	<input type="checkbox"/>

A CRM APPLICATION FOR BANQUET HALL BOOKING

5. Click on Next
6. In Assign Page Layout
 - Apply one layout to all profiles: Select Official Booking

Step 2. Assign page layouts

Banquet Hall Record Type: Official Booking

Record Type Name: Official_Booking

Description: It is for Official Meetings, lunch, gatherings

Select the page layout that users with this profile see for records with this record type. After saving, choose the picklist values that are available with this record type.

☒ Apply one layout to all profiles ☐ Apply a different layout for each profile

Official Booking

Profile: Analytics Cloud Integration User, Analytics Cloud Security User

Page Layout: Official Booking, Official Booking

7. Click on Save

Record Type: Official Booking

< Back to Custom Object: Banquet Hall

Use the Edit button to change the properties of this record type. Use the Edit links in the Picklist Values related list to choose the picklist values available for records with this record type.

Edit

Record Type Label	Record Type Name	Namespace Prefix	Description	Created By	Modified By	Active
Official Booking	Official_Booking		It is for official Meetings,Lunch, gatherings	DEEPAK DEEPAK, 6/1/2025, 11:38 PM	DEEPAK DEEPAK, 6/1/2025, 11:40 PM	✓

Picklists Available for Editing

Action	Field	Modified Date
Edit	Decoration Purpose	6/1/2025, 11:38 PM
Edit	Food Menu	6/1/2025, 11:38 PM
Edit	Timings	6/1/2025, 11:38 PM

Activity 2: To create a Record Type for Celebrations in Banquet Hall Object

1. Go to setup --> click on Object Manager --> type object name(Banquet Hall) in quick find box--> click on the Banquet Hall object.
2. Click on the Record Types.
3. Click on New.

SETUP > OBJECT MANAGER

Banquet Hall

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Record Types

0 Items, Sorted by Record Type Label

Q, Quick Find

New

Page Layout Assignment

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
No items to display.			

A CRM APPLICATION FOR BANQUET HALL BOOKING

4. Enter the details: For Record Types

- Existing Record Types: Master
- Record Type Label: Celebrations
- Record Type Name: Celebrations
- Active: Tick checkbox

Step 1. Enter the details

Enter a name and description for the new record type. The new record type will include all the picklist values from the existing record type selected below. After saving the new record type, you will be able to customize the picklist values.

Record Type

Existing Record Type: --Master--

Record Type Label: Celebrations

Record Type Name: Celebrations

Description: It is for marriages, birthday parties, receptions, etc.

Active: ☒

Select Make Available to give users assigned to this profile the ability to create and clone records of this record type, or assign this record type to existing records. To make the new record type the default for a profile, select Make Default. Users assigned to this record type can still view and edit records associated with record types not available for their profiles.

Profile Name	Record Types Currently Available	<input checked="" type="checkbox"/> Make Available	<input type="checkbox"/> Make Default
Analytics Cloud Integration User	Official Booking (Default)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	Official Booking (Default)	<input checked="" type="checkbox"/>	<input type="checkbox"/>

5. Click on Next

6. In Assign Page Layout

- Apply one layout to all profiles: Select Celebrations

Step 2. Assign page layouts

Banquet Hall Record Type: Celebrations

Record Type Name: Celebrations

Description: It is for marriages, birthday parties, receptions, etc.

Select the page layout that users with this profile see for records with this record type. After saving, choose the picklist values that are available with this record type.

☒ Apply one layout to all profiles

☐ Apply a different layout for each profile

Page Layout: Celebrations

7. Click on Save

Record Type

Celebrations

[Back to Custom Object: Banquet Hall](#)

Use the Edit button to change the properties of this record type. Use the Edit links in the Picklist Values related list to choose the picklist values available for records with this record type.

Edit

Record Type Label	Celebrations	Active	<input checked="" type="checkbox"/>
Record Type Name	Celebrations		
Namespace Prefix			
Description	It is for marriages, birthday parties, receptions etc		
Created By	DEEPAK DEEPAK, 6/1/2025, 11:39 PM	Modified By	DEEPAK DEEPAK, 6/1/2025, 11:39 PM

Picklists Available for Editing

Action	Field	Modified Date
Edit	Decoration Purpose	6/1/2025, 11:39 PM
Edit	Food Menu	6/1/2025, 11:39 PM
Edit	Timings	6/1/2025, 11:39 PM

A CRM APPLICATION FOR BANQUET HALL BOOKING

Milestone 8

Validation Rules

Activity 1: To create a validation rule to an Banquet Hall Object

1. Go to setup --> click on Object Manager --> type object name (Banquet Hall) in quick find box--> click on the Banquet Hall object
2. Click on the validation rule --> click on New.
3. Enter the Rule name as "BookingDateChecking".
4. Select Active
5. Insert the Error Condition Formula as:
Booking_Date__c <= TODAY ()

The screenshot shows the 'New Validation Rule' page in Salesforce. The 'Rule Name' field is set to 'BookingDateChecking' (labeled 3). The 'Active' checkbox is checked (labeled 4). The 'Error Condition Formula' field contains the formula 'Booking_Date__c <= TODAY()' (labeled 5). A functions list is visible on the right, and a 'Check Syntax' button is at the bottom left.

6. Enter the Error Message as "Booking Date must be a future Date".
7. Select the Error location as Field and as Booking Date and click Save.

The screenshot shows the 'Error Message' configuration dialog. The 'Error Message' field contains the text 'Booking Date must be a future Date' (labeled 6). The 'Error Location' is set to 'Field' and the specific field is 'Booking Date' (labeled 7). The dialog includes 'Save', 'Save & New', and 'Cancel' buttons at the bottom.

A CRM APPLICATION FOR BANQUET HALL BOOKING

Banquet Hall Validation Rule

[Back to Banquet Hall](#)

Validation Rule Detail

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

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	DEEPAK DEEPAK, 6/1/2025, 11:41 PM	Modified By	DEEPAK DEEPAK, 6/1/2025, 11:41 PM

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

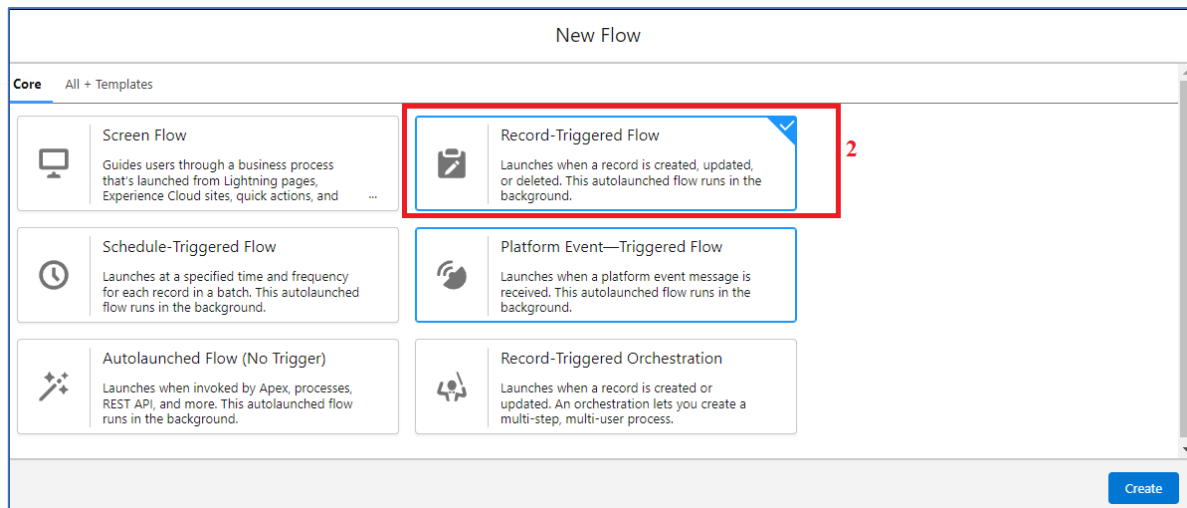
A CRM APPLICATION FOR BANQUET HALL BOOKING

Milestone 9

Flows

Activity 1: Create Flow to check whether the same booking date and timings are already available.

1. Go to setup --> type Flow in quick find box --> Click on the Flow and Select the New Flow.
2. Select the record Triggered flow. Click on create.



3. Under Object select "Banquet Hall"
4. Select A record is created

The screenshot shows the 'Select Object' and 'Configure Trigger' steps of the flow setup. The 'Select Object' section has a red box around the '* Object' field with the value 'Banquet Hall' and a red number '3' to its right. The 'Configure Trigger' section has a red box around the '* Trigger the Flow When:' section with a red number '4' to its right. The selected trigger is 'A record is created', which is also marked with a radio button.

5. Set Entry Conditions: None
6. Select Fast Field Updates

A CRM APPLICATION FOR BANQUET HALL BOOKING

Set Entry Conditions

Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

Condition Requirements: None 5

*** Optimize the Flow for:** 6

Fast Field Updates ✓
Update fields on the record that triggers the flow to run. This high-performance flow runs *before* the record is saved to the database.

Actions and Related Records
Update any record and perform actions, like send an email. This more flexible flow runs *after* the record is saved to the database.

Cancel Done

7. Under the record trigger flow click on the "+" icon and select Get Records.
8. Enter Label as "Duplicate Checking for Banquet Hall".
9. For Object select Banquet Hall

Find Salesforce records and store their field values in flow variables.

* Label 8: Duplicate Checking for Banquet Hall

* API Name: Duplicate_Checking_for_Banquet_Hall

Description:

Get Records of This Object

* Object 9: Banquet Hall

10. For Condition Requirements, select All Conditions are Met (AND)
 - 10a. For the first condition select as follows:
Field: Booking_Date__c
Operator: Equals
Value: {! \$Record.Booking_Date__c}
 - 10b. For the second condition select as follows:
Field: Timings__c
Operator: Equals
Value: {! \$Record.Timings__c}

A CRM APPLICATION FOR BANQUET HALL BOOKING

Filter Banquet Hall Records

Condition Requirements
All Conditions Are Met (AND) 10

Field Operator Value 10a
Booking_Date__c Equals \$Record > Booking Date X

AND Field Operator Value 10b
Timings__c Equals \$Record > Timings X

+ Add Condition

11. For How many Records to store Select All Records.

12. For How to Store Record Data select Choose Automatically Store All Fields. Click on Done.

Sort Banquet Hall Records

Sort Order
Not Sorted

⚠ If you store only the first record, filter by a unique field, such as ID.

How Many Records to Store
☐ Only the first record
☒ All records 11

How to Store Record Data
☒ Automatically store all fields 12
☐ Choose fields and let Salesforce do the rest
☐ Choose fields and assign variables (advanced)

Cancel Done

13. From the Toolbox drag and drop Decision element.

14. Enter the Decision label as "Duplicate Checking on Banquet Hall".

15. For Outcome Details:

- Label: BookingSlotChecking
- Outcome API Name: BookingSlotChecking
- Condition Requirements to Execute Outcome: All Conditions are Met (AND)
- Resource: {! Duplicate_Checking_for_Banquet_Hall}
- Operator: Is Null
- Value: {! \$GlobalConstant.False}

A CRM APPLICATION FOR BANQUET HALL BOOKING

DuplicateCheckingonBanquetHall 14

Description

Outcomes For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.

OUTCOME ORDER +

BookingSlotChecking

Default Outcome

OUTCOME DETAILS 15

*Label BookingSlotChecking *Outcome API Name BookingSlotChecking

Condition Requirements to Execute Outcome All Conditions Are Met (AND)

Resource Operator Value

Banquet Halls from Duplicate_Checking_for_Ban... Is Null False

16. Click Done

17. From the Toolbox drag and drop Custom Error Message element.

18. Enter the label as "Banquet Hall Booking Error Message".

19. For Where to Show the Error Message: Select In a window on a record page

New Custom Error Message

*Label Banquet Hall Booking Error Message 18 *API Name Banquet_Hall_Booking_Error_Message

Description

Set Error Message 1 Details

Where to Show the Error Message: 19

☒ In a window on a record page

☐ As an inline error on a field

Error Message

*Enter an error message with no more than 255 characters.

Resource Picker

Insert a resource

Cancel Done

20. Error Message: On {! \$Record.Booking_Date_c}, in the {! \$Record.Timings__c} the Banquet Hall is not Available for Booking

A CRM APPLICATION FOR BANQUET HALL BOOKING

Error Message

*Enter an error message with no more than 255 characters.

Resource Picker

Insert a resource...

On {!\$Record.Booking_Date__c} , in the {!\$Record.Timings__c} the Banquet Hall is not Available for Booking

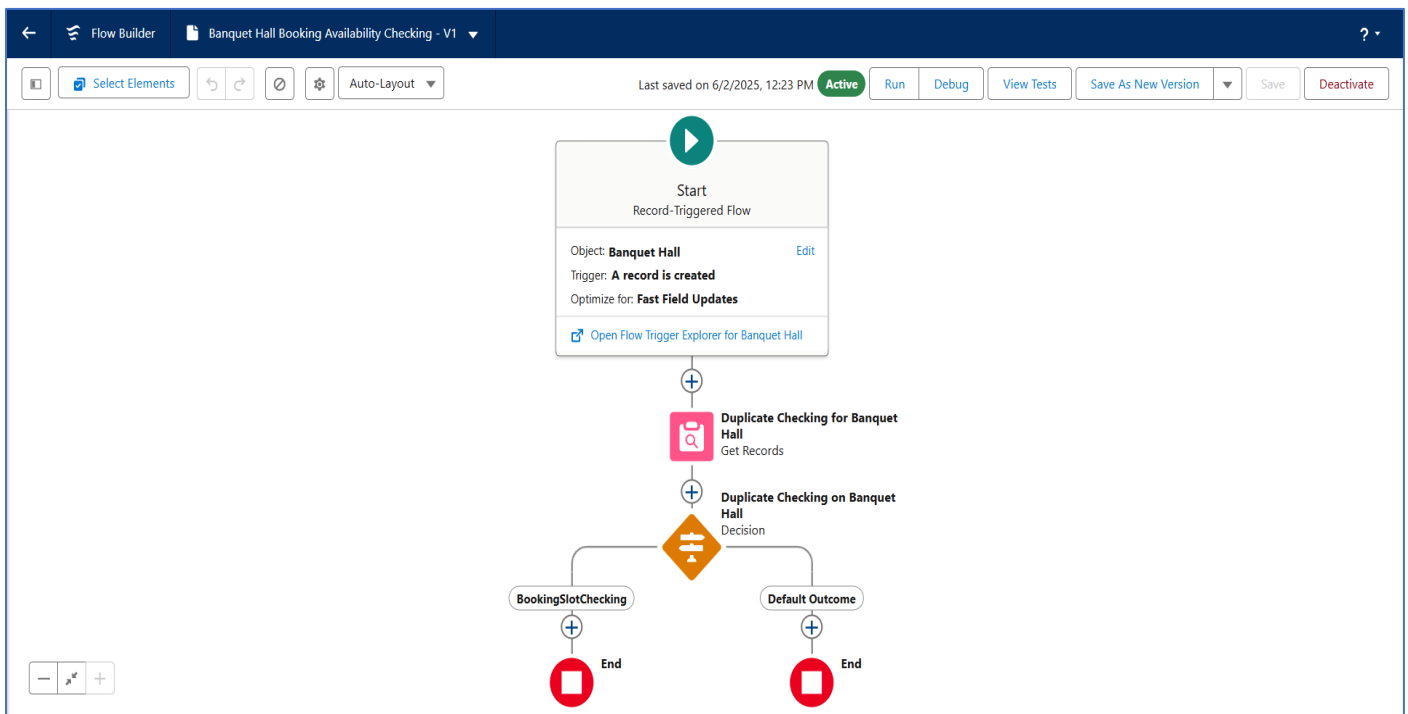
+ Add Error Message

Cancel Done

21. Click Done

22. Save the flow as "Banquet Hall Booking Availability Checking"

23. Activate the flow.



A CRM APPLICATION FOR BANQUET HALL BOOKING

Milestone 10

Triggers

Activity 1: Create a Trigger for Automated Billing Creation upon Banquet Hall Creation

Step 1 : Login to Salesforce:

Log in to your Salesforce account with administrative privileges.

Step 2:

i) Navigate to Setup: Once logged in, click on the gear icon (Setup) located at the top-right corner of the page. This will open the Setup menu.

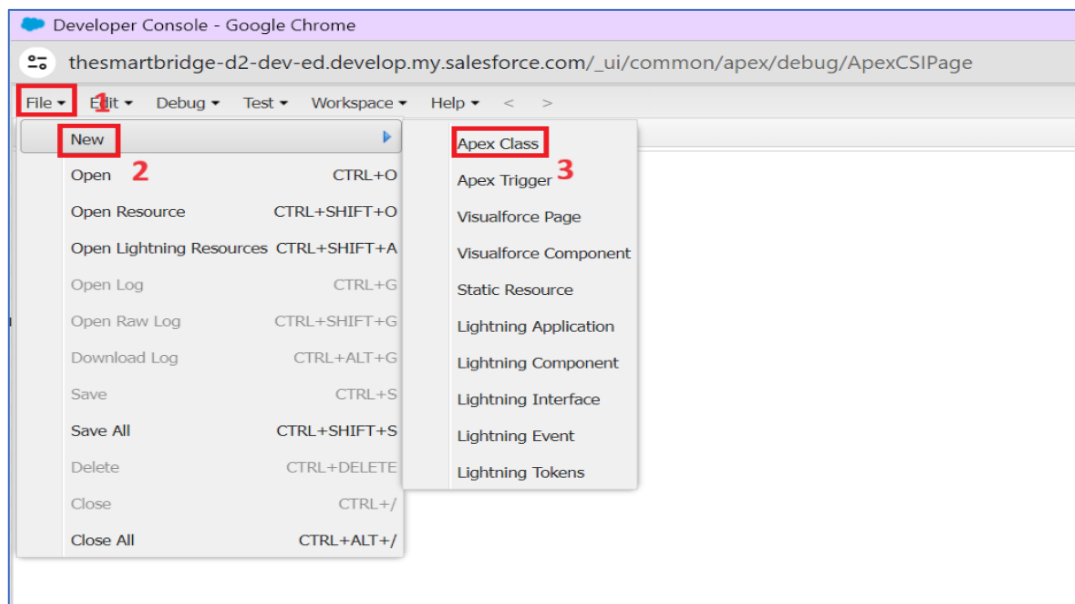
ii) Click on Developer Console: Click on the "Developer Console" option from the Setup menu. This will open the Developer Console in a new browser tab or window.

Step 3:

1) In the Developer Console window, go to the top menu and click on "File".

2) Select New: From the dropdown menu under "File", select "New".

3) Choose Apex Class: In the submenu that appears, select "Apex Class". This will open a new Apex Class editor tab.



Give Class Name: BillingTriggerHandlerClass

Create an Apex Class:

```
public class BillingTriggerHandlerClass {  
    Public Static Void BillingCreationonBooking (List<Banquet_Hall__c> bHallList) {
```

A CRM APPLICATION FOR BANQUET HALL BOOKING

```
List<Billing__c> billList = new List<Billing__c> ();
for (Banquet_Hall__c bHall: bHallList) {
    Billing__c bil = new Billing__c ();
    bil.Customer_Name__c =bHall.Id;
    bil.Email__c = bHall.Email__c;
    billList.add(bil);
}

if (! billList.isEmpty()) {
    insert billList;
}
}
```

```
public class BillingTriggerHandlerClass {
    Public Static Void BillingCreationonBooking(List<Banquet_Hall__c> bHallList){
        List<Billing__c> billList = new List<Billing__c>();

        for(Banquet_Hall__c bHall : bHallList){
            Billing__c bil = new Billing__c();
            bil.Customer_Name__c =bHall.Id;
            bil.Email__c = bHall.Email__c;
            billList.add(bil);
        }
        if(!billList.isEmpty()){
            insert billList;
        }
    }
}
```

Step 4:

- i) In the Developer Console window, go to the top menu and click on "File".
- ii) Select New: From the dropdown menu under "File", select "New".
- iii) Choose Apex Class: In the submenu that appears, select "Apex Trigger". This will open a new Apex Trigger editor tab.

Create an Apex Trigger:

```
trigger BillingRecordCreation on Banquet_Hall__c (after insert) {
    if (trigger.isInsert) {
        if (trigger.isAfter) {
            BillingTriggerHandlerClass.BillingCreationonBooking(trigger.new);
        }
    }
}
```

A CRM APPLICATION FOR BANQUET HALL BOOKING

```
}  
}  
}
```

```
trigger BillingRecordCreation on Banquet_Hall__c (after insert) {  
    if(trigger.isInsert){  
        if(trigger.isAfter){  
            BillingTriggerHandlerClass.BillingCreationonBooking(trigger.new);  
        }  
    }  
}
```

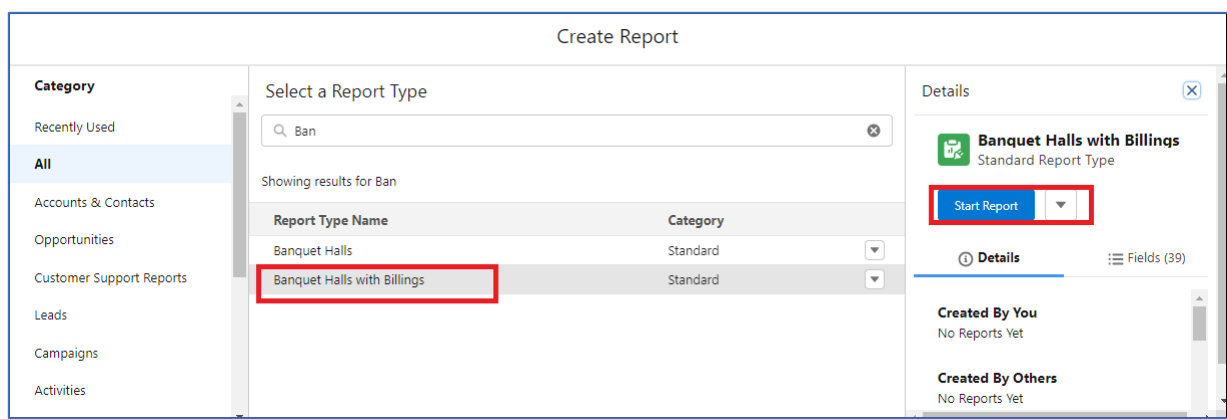
A CRM APPLICATION FOR BANQUET HALL BOOKING

Milestone 11

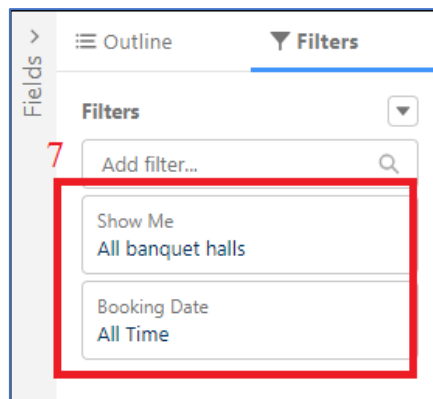
Reports

Activity 1: Create a Summary Report

6. Click App Launcher
2. Select Banquet Hall Booking App
3. Click Reports tab
4. Click New Report.
5. Click the report type as Banquet Halls with Billings Click Start report.



6. Click on Filters and select as follows and click on Apply



7. Customize your report, in group rows select – Booking Date, for columns Timings, Total Bill Amount (In this way we are making a Summary Report).
8. Click save and run
9. Give report name – Banquet Halls with Billings Report
10. Click Save

NOTE: In this report you can see your all record of the object you selected for reporting
(What you selects in "Select a report type option")

A CRM APPLICATION FOR BANQUET HALL BOOKING

Banquet Hall Booking

Banquet Halls

Billings

Staff

Reports

Dashboards

REPORT

Banquet Halls with Billings Report

Banquet Halls with Billings

↶

↷

Add Chart

Save & Run

Save

Close

Run

Update Preview Automatically

Outline

Filters

Groups

GROUP ROWS

Add group...

Booking Date

GROUP COLUMNS

Add group...

Columns

Add column...

Total Bill Amount

Timings

Booking Date

Total Bill Amount

Timings

Previewing a limited number of records. Run the report to see everything.

Update Preview Automatically

Subtotal	₹1,25,000.00	Evening
01/05/2024	₹1,90,000.00	Evening
Subtotal	₹1,90,000.00	
02/05/2024	₹32,500.00	Morning
Subtotal	₹32,500.00	
03/05/2024	₹2,20,000.00	Evening
Subtotal	₹2,20,000.00	
09/05/2024	₹27,500.00	Morning
Subtotal	₹27,500.00	
15/05/2024	₹1,10,000.00	Morning
Subtotal	₹1,10,000.00	
Total	₹9,95,000.00	

force.com/reports/lightningReportApp.app?reportId=000C00000MYLIP2A5#

Rows

Subtotals

Grand Total

Conditional Formatting

Activate Windows
Go to Settings to activate Windows.

Banquet Hall Booking

Banquet Halls

Billings

Staffs

Reports

Dashboards

REPORT

Banquet Halls with Billings Report

Banquet Halls with Billings

↶

↷

Add Chart

Save & Run

Save

Close

Run

Update Preview Automatically

Outline

Filters

Groups

GROUP ROWS

Add group...

Booking Date

GROUP COLUMNS

Add group...

Columns

Add column...

Total Bill Amount

Timings

Booking Date

Total Bill Amount

Timings

Previewing a limited number of records. Run the report to see everything.

Update Preview Automatically

6/3/2025 (2)	\$97,500.00	Evening
	\$97,500.00	Evening
Subtotal	\$195,000.00	
Total (2)	\$195,000.00	

Row Counts

Detail Rows

Subtotals

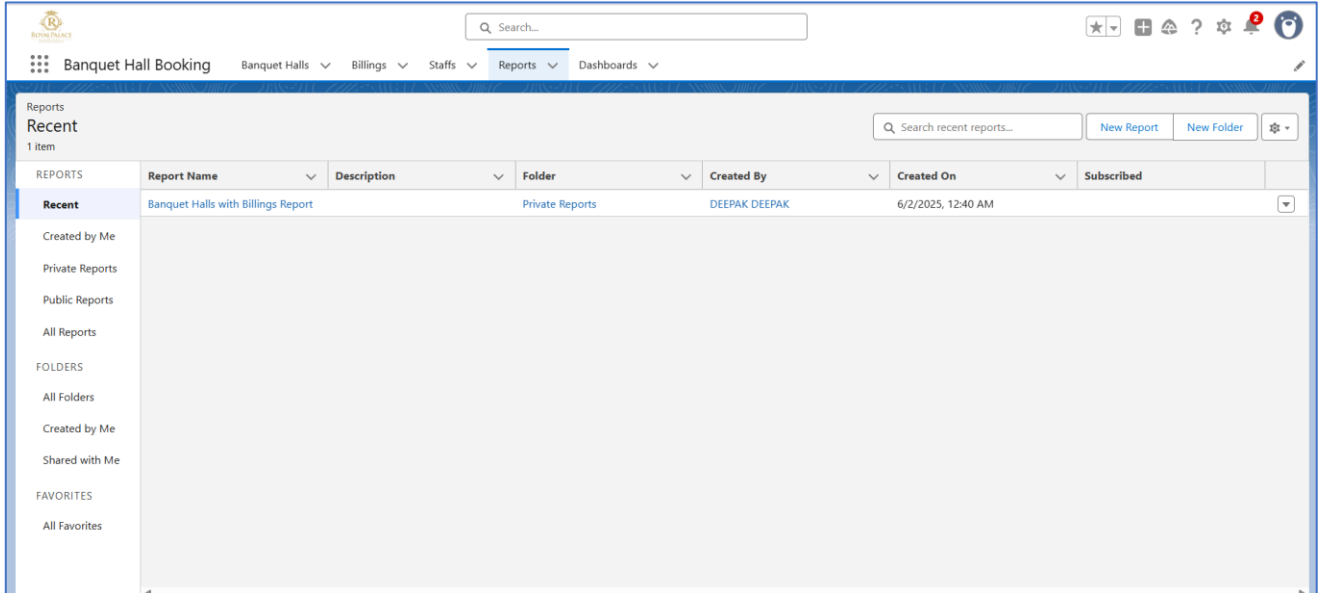
Grand Total

Conditional Formatting

A CRM APPLICATION FOR BANQUET HALL BOOKING

Activity 2: View Report

1. Click on App Launcher on the left side of the screen.
2. Search Banquet Hall Booking App & click on it.



3. Click on Reports Tab.
4. Click on Banquet Halls with Billings Report and see records.

The screenshot shows the 'Banquet Halls with Billings Report' details. The top navigation bar is the same as the previous screenshot. The 'Reports' tab is selected, and the 'Banquet Halls with Billings Report' is highlighted. The report details show 'Total Records: 2' and 'Total Total Bill Amount: \$195,000.00'. The report table has columns for 'Booking Date', 'Total Bill Amount', and 'Timings'. The data shows two records for '6/3/2025 (2)' with a 'Total Bill Amount' of '\$97,500.00' and 'Evening' timings. The 'Subtotal' is '\$195,000.00' and the 'Total (2)' is '\$195,000.00'. The bottom of the screen shows a summary bar with 'Row Counts', 'Detail Rows', 'Subtotals', and 'Grand Total' all checked.

Booking Date	Total Bill Amount	Timings
6/3/2025 (2)	\$97,500.00	Evening
6/3/2025 (2)	\$97,500.00	Evening
Subtotal	\$195,000.00	
Total (2)	\$195,000.00	

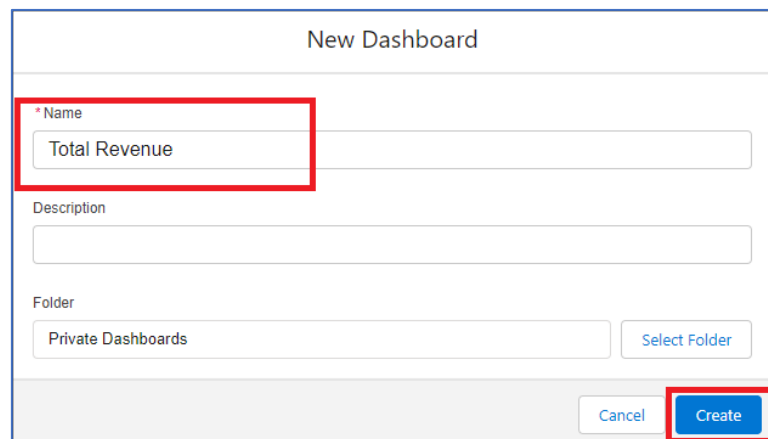
A CRM APPLICATION FOR BANQUET HALL BOOKING

Milestone 12

Dashboards

Activity 1: - Create Dashboard

1. Click on the Dashboards tab from the Banquet Hall Booking application.
2. Click on the new dashboard.
3. Give name - Total Revenue
4. Click create



New Dashboard

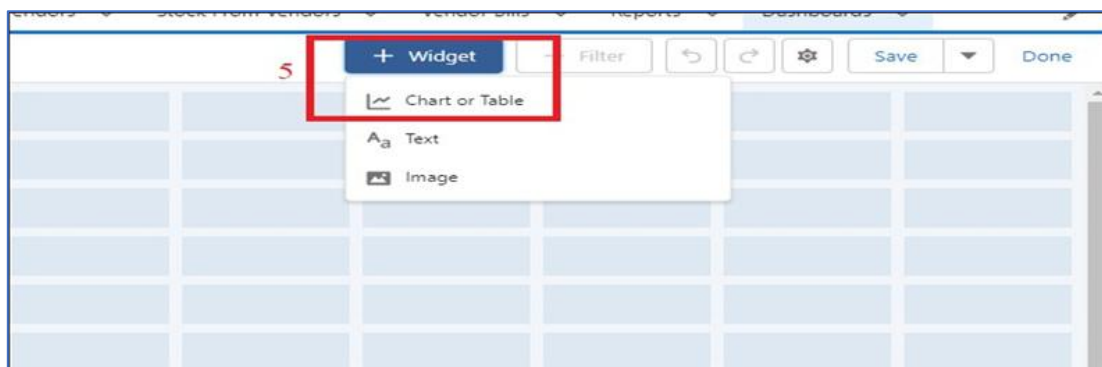
*Name
Total Revenue

Description

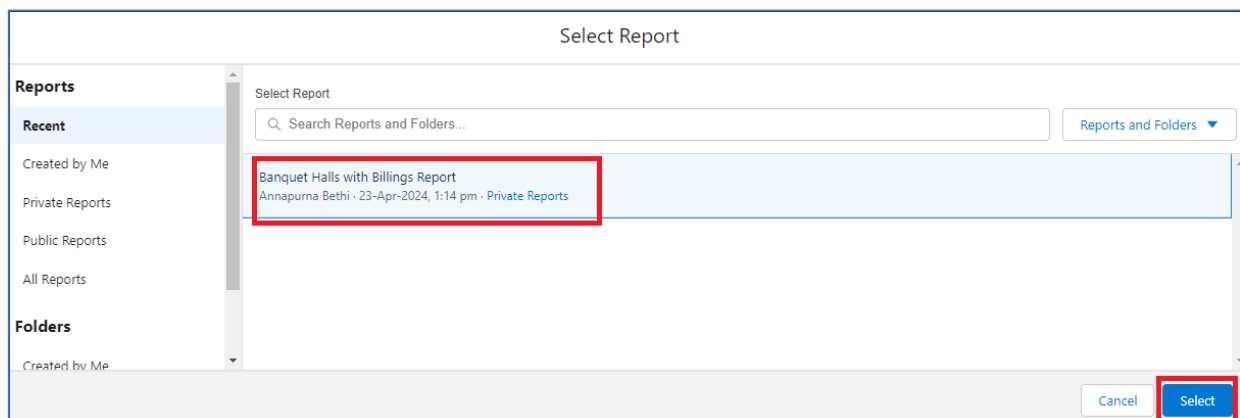
Folder
Private Dashboards [Select Folder](#)

[Cancel](#) [Create](#)

5. Give your dashboard a name and click on +widget



6. Select the Banquet Halls with Billings Report.



Select Report

Recent

Created by Me

Private Reports

Public Reports

All Reports

Folders

Created by Me

Select Report

Search Reports and Folders...

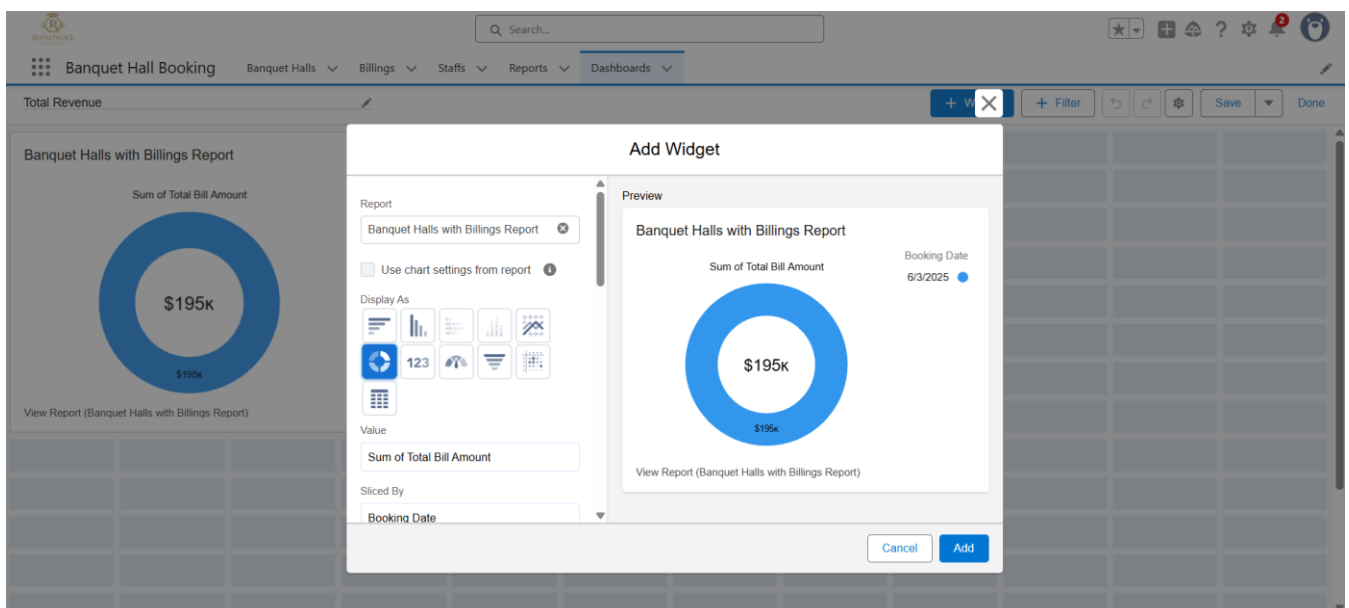
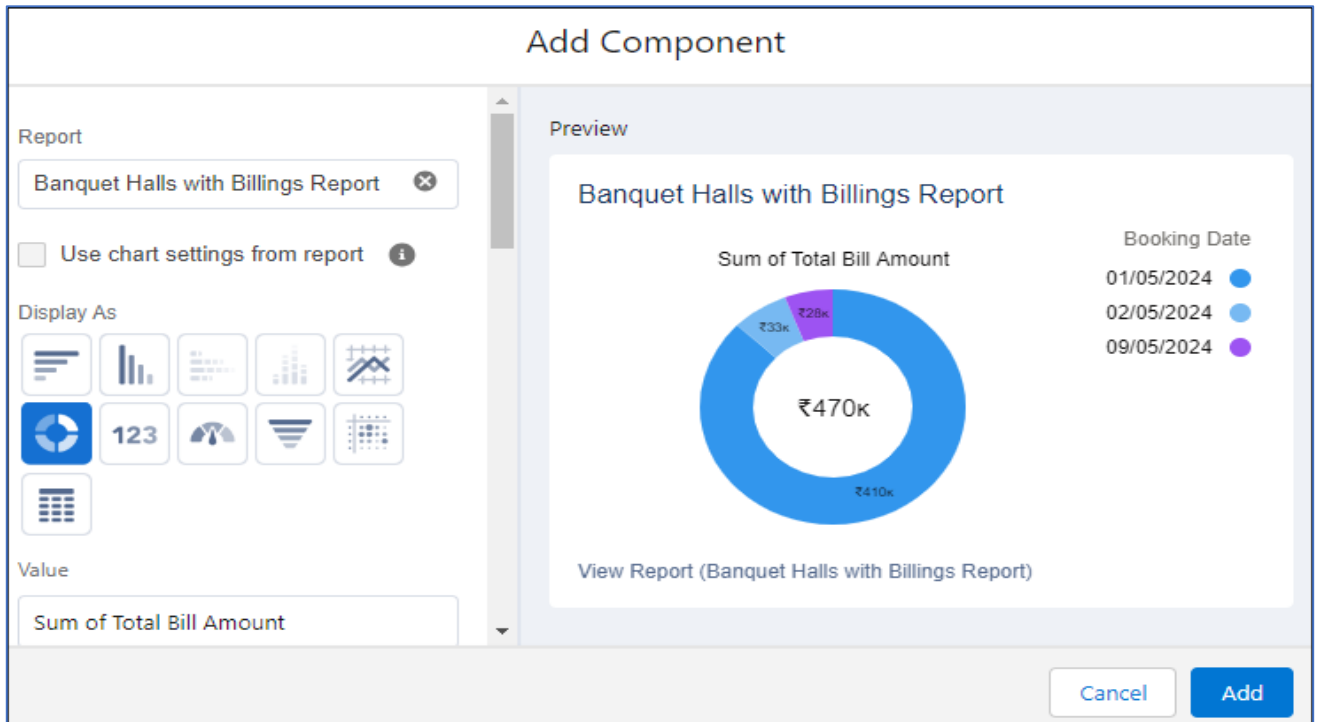
Reports and Folders

Banquet Halls with Billings Report
Annapurna Bethi • 23-Apr-2024, 1:14 pm • Private Reports

[Cancel](#) [Select](#)

A CRM APPLICATION FOR BANQUET HALL BOOKING

- For the data visualization select any of the charts, tables etc. as per your choice/requirement.
- Click add.
- Click save.

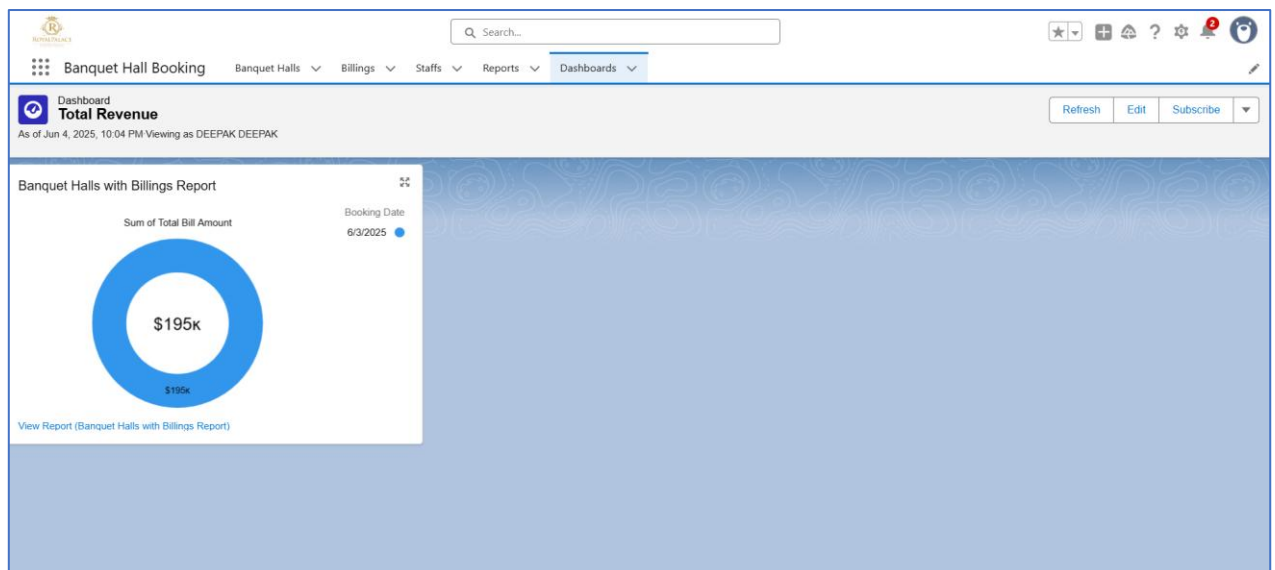
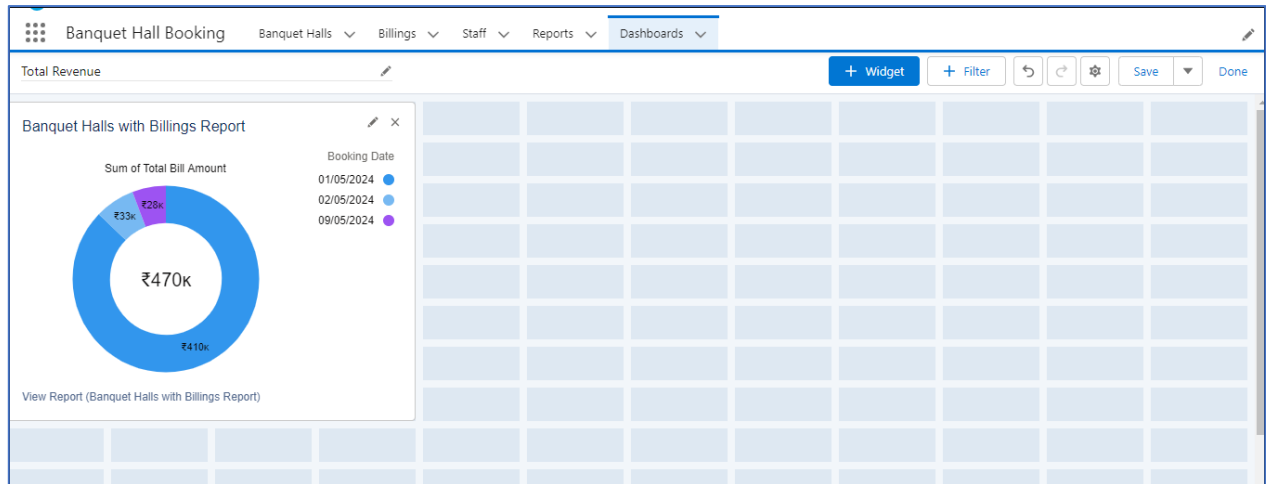


(Dashboards, data visualization select any of the charts, tables etc.)

A CRM APPLICATION FOR BANQUET HALL BOOKING

Activity 2: View Dashboard

1. Click on App Launcher on the left side of the screen.
2. Search Banquet Hall Booking & click on it.
3. Click on Dashboard Tab.
4. Click on Total Revenue see graph view of records



(Dashboards, Total Revenue see graph view of records)

Milestone 13

Conclusion

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.