

# 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.

# A CRM APPLICATION FOR BANQUET HALL BOOKING

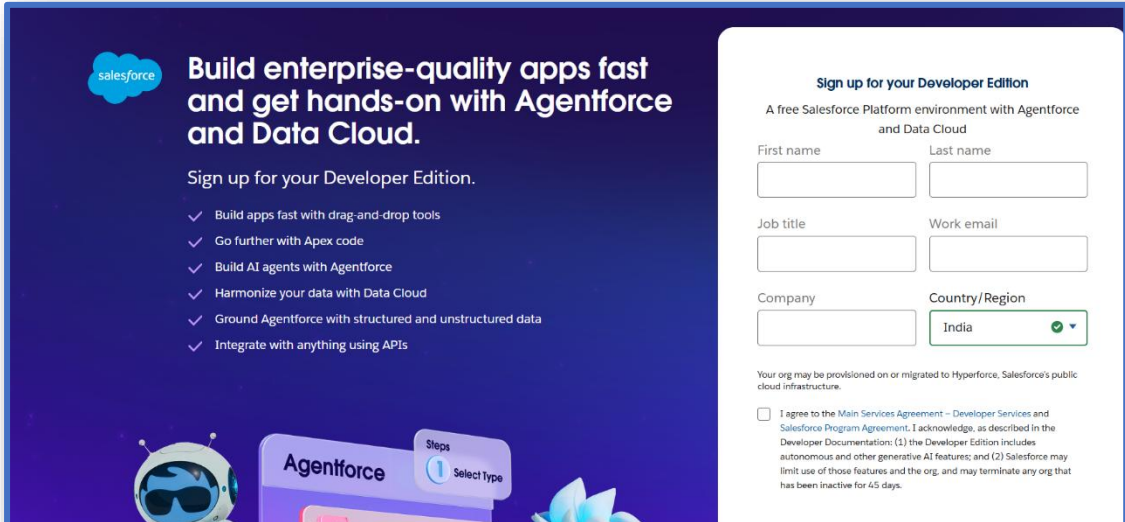
## MILESTONE 1

### 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 :
  1. First name - LIKHITHA



The screenshot shows the Salesforce Developer Edition sign-up page. On the left, there's a blue banner 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", "Ground Agentforce with structured and unstructured data", and "Integrate with anything using APIs". At the bottom of the banner are illustrations of a robot head, a book labeled "Agentforce", and a flower. On the right, the sign-up form is titled "Sign up for your Developer Edition" and "A free Salesforce Platform environment with Agentforce and Data Cloud". It contains input fields for "First name", "Last name", "Job title", "Work email", "Company", and a "Country/Region" dropdown menu (currently 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 small disclaimer about org provisioning.

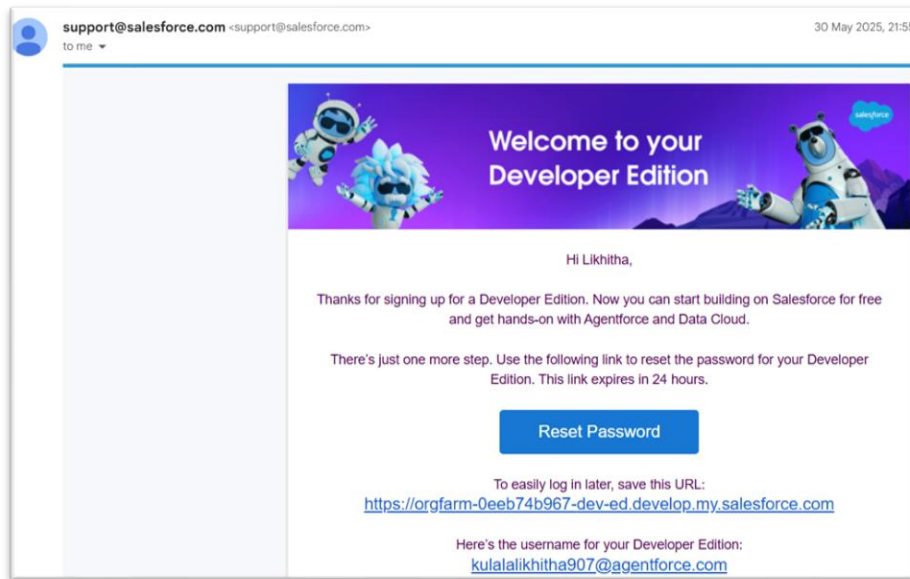
2. Last name -KULALA
3. Email -kulalalikhitha@gmail.com
4. Role – Developer
5. Company – Gayatri degree college Tirupati
6. Country – India

# A CRM APPLICATION FOR BANQUET HALL BOOKING

## 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



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

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Change Your Password

Enter a new password for **lead@sb.oom**.  
Make sure to include at least:

- ✓ 8 characters
- ✓ 1 letter
- ✓ 1 number

\* New Password  
[password field] Good

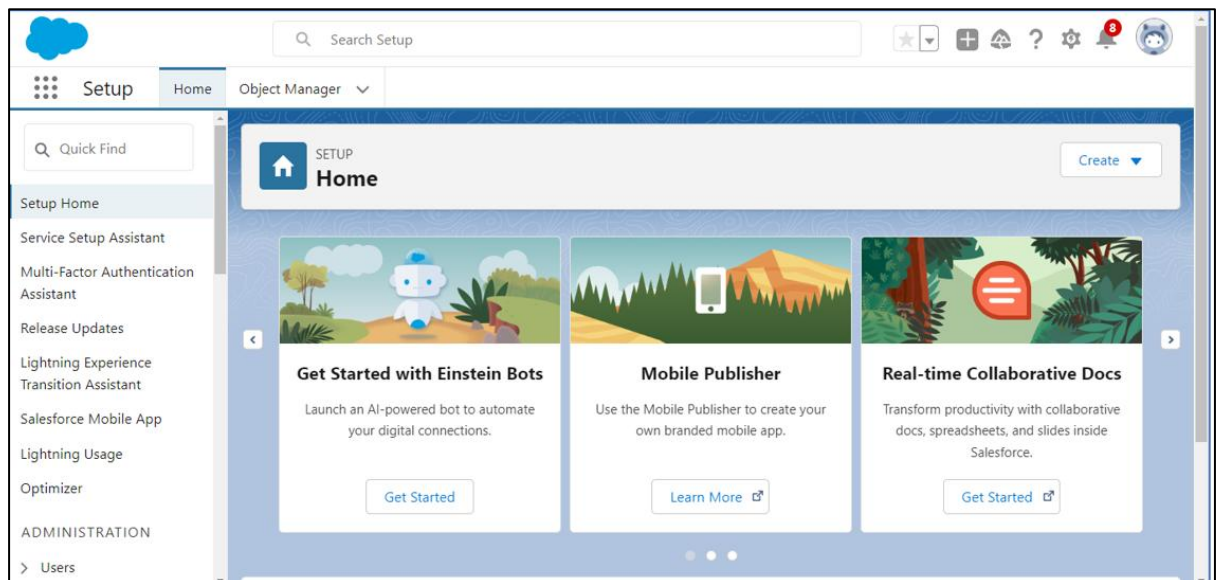
\* Confirm New Password  
[password field] Match

Security Question  
▼ In what city were you born?

\* Answer  
[answer field: asdfghjkl]

Change Password

4. Then You Will redirect to your salesforce setup page.



# A CRM APPLICATION FOR BANQUET HALL BOOKING

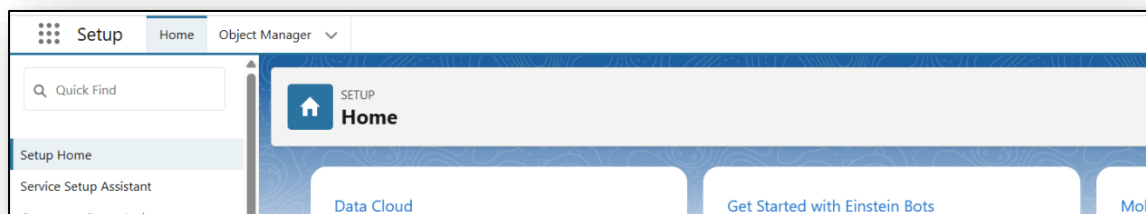
## MILESTONE 2 OBJECT

### 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.

#### To create an object:

1. From the setup page.
2. Click on object manager.



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

**Custom Object Definition Edit** [Save] [Save & New] [Cancel]

**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

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

# A CRM APPLICATION FOR BANQUET HALL BOOKING

**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 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 must use the Bulk API.

**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

9. Select Allow search.
10. 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

# A CRM APPLICATION FOR BANQUET HALL BOOKING

The screenshot shows the 'Custom Object Definition Edit' page. At the top, there are buttons for 'Save', 'Save & New', and 'Cancel'. Below this is the 'Custom Object Information' section. It includes a text box for 'Label' with the value 'Billing' and an example 'Example: Account'. Below that is a text box for 'Plural Label' with the value 'Billings' and an example 'Example: Account'. There is a checkbox for 'Starts with vowel sound' which is currently unchecked. Below this is a text box for 'Object Name' with the value 'Billing' and an example 'Example: Account'. There is a large text area for 'Description'. At the bottom, there is a 'Context-Sensitive Help Setting' section with two radio buttons: 'Open the standard Salesforce.com Help & Training window' (selected) and 'Open a window using a Visualforce page'. Below this is a 'Content Name' dropdown menu with the value 'None'.

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

The screenshot shows the 'Enter Record Name Label and Format' page. It includes a text box for 'Record Name' with the value 'Billing No' and an example 'Example: Account Name'. Below this is a dropdown menu for 'Data Type' with the value 'Auto Number' and a warning message: 'Warning: If you plan to insert a high volume of records, using Auto Number as the data type may cause performance issues.' Below this is a text box for 'Display Format' with the value 'BILL-{0000}' and an example 'Example: A-{0000}' and a link 'What Is This?'. Below this is the 'Optional Features' section with several checkboxes: 'Allow Reports' (checked), 'Allow Activities' (unchecked), 'Track Field History' (unchecked), 'Allow in Chatter Groups' (unchecked), and 'Enable Licensing' (unchecked). Below this is the 'Object Classification' section with several checkboxes: 'Allow Sharing' (checked), 'Allow Bulk API Access' (checked), and 'Allow Streaming API Access' (checked).

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

# A CRM APPLICATION FOR BANQUET HALL BOOKING

## Search Status

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

☒ Allow Search

Save

Save & New

Cancel

## Activity 3: Creating a Staff Object

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

## Custom Object Definition Edit

Save

Save & New

Cancel

### 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

Staff

Example: Account

Plural Label

Staffs

Example: Accounts

Starts with vowel sound

☐

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

Object Name

Staff

Example: Account

Description

Context-Sensitive Help Setting

☒

Open the standard Salesforce.com Help & Training window

☐

Open a window using a Visualforce page

Content Name

None

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



# A CRM APPLICATION FOR BANQUET HALL BOOKING

**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.](#)

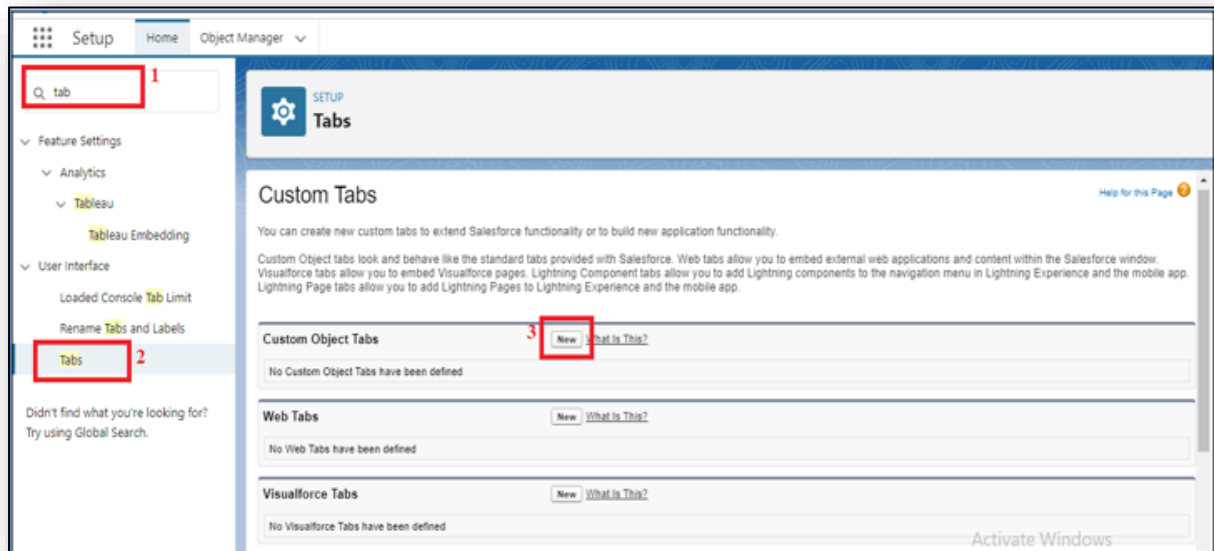
☒ Allow Search

# A CRM APPLICATION FOR BANQUET HALL BOOKING

## 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.

# A CRM APPLICATION FOR BANQUET HALL BOOKING

**Custom Tab Definition Edit**

**Custom Object Tab Information**

|           |  |
|-----------|--|
| Tab Label | Banquet Halls  |
| Object    | <u>Banquet Hall</u>  |
| Tab Style |  Building Block  |

(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--

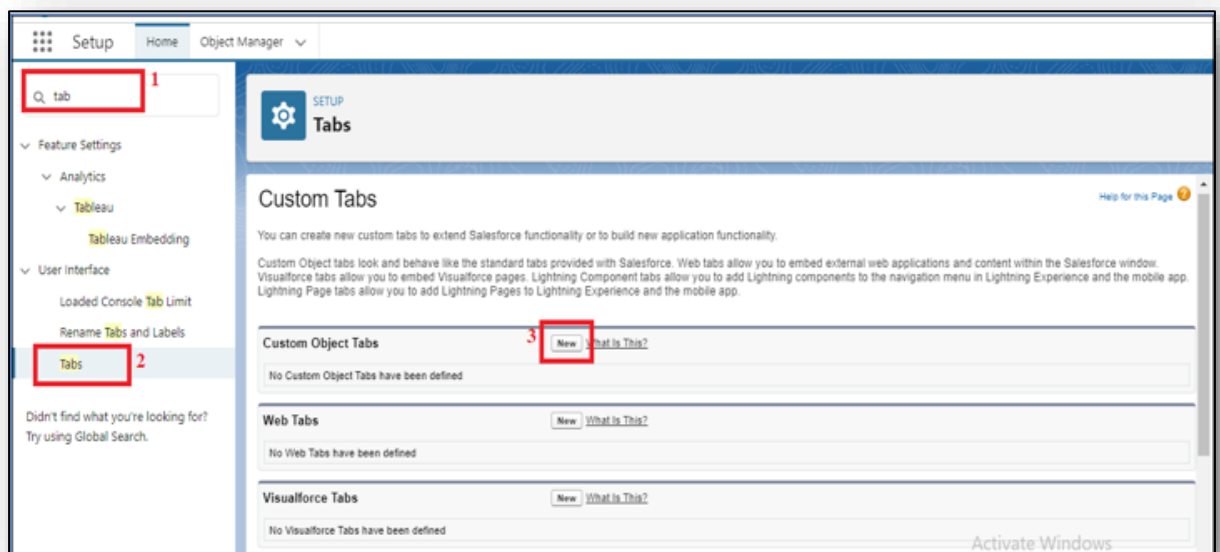
Enter a short description.

Description

Save Cancel

## Activity 2: Creating a tab for Billing Object

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





2. Click on New (under custom object tab).
3. Select Object (Billing) --> Select the tab style
4. Click on Next --> (Add to profiles page) keep it as default --> Click on Next (Add to Custom App) uncheck the include tab.

## A CRM APPLICATION FOR BANQUET HALL BOOKING

5. Make sure that the Append tab to users' existing personal customizations is checked.
6. Click save.

**Custom Tab Definition Edit**

**Custom Object Tab Information**

|           |  |
|-----------|--|
| Tab Label | Billings   |
| Object    | Billing  |
| Tab Style |  Bank  |

(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

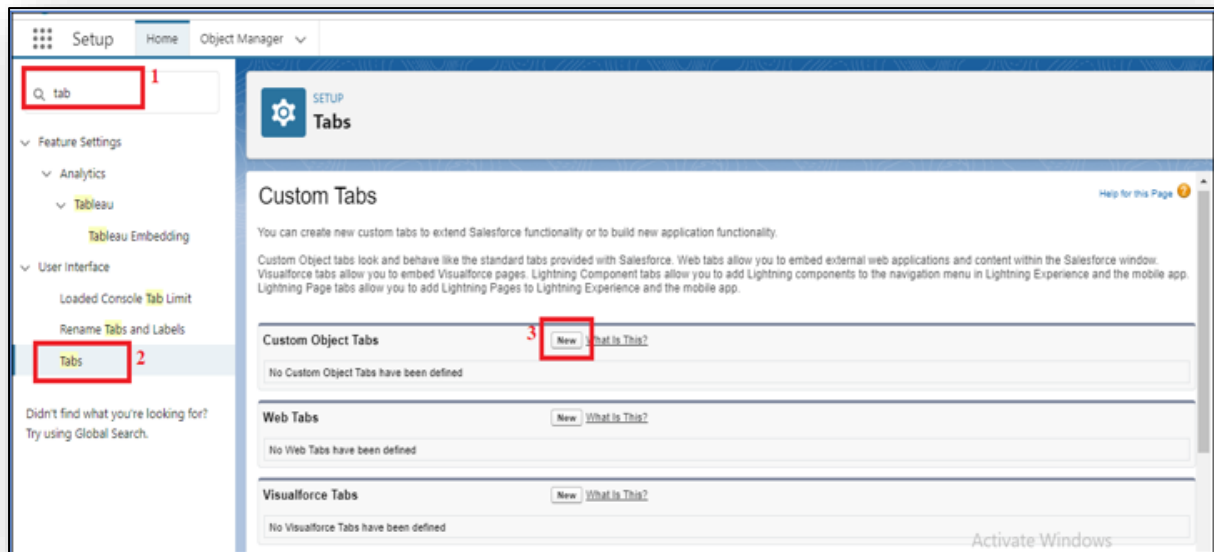
Enter a short description.

Description

### Activity 3: Creating a tab for staff Object

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



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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 |  Laptop  |

(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

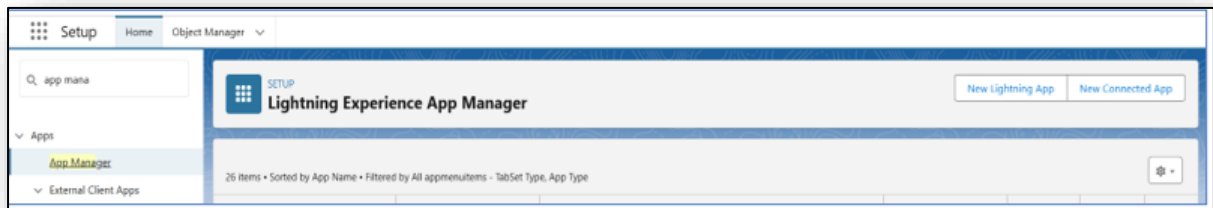
Save Cancel

# A CRM APPLICATION FOR BANQUET HALL BOOKING

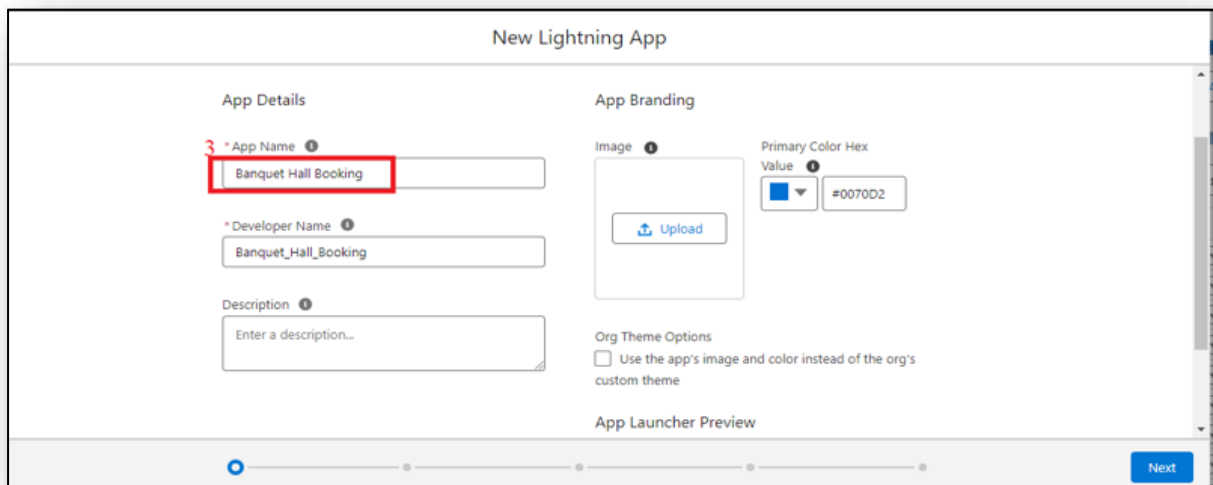
## Milestone 4 The Lightning App

### Activity 1: 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.

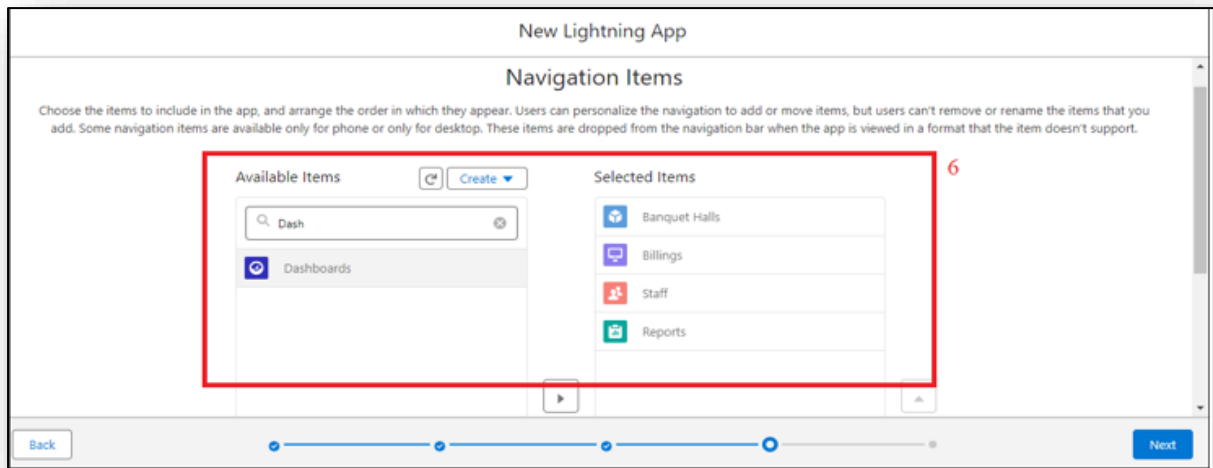


3. Enter Banquet Hall Booking as the App Name, then click next
4. Under App Options, leave the default selections and click next.
5. Under Utility Items, leave as is and click Next.

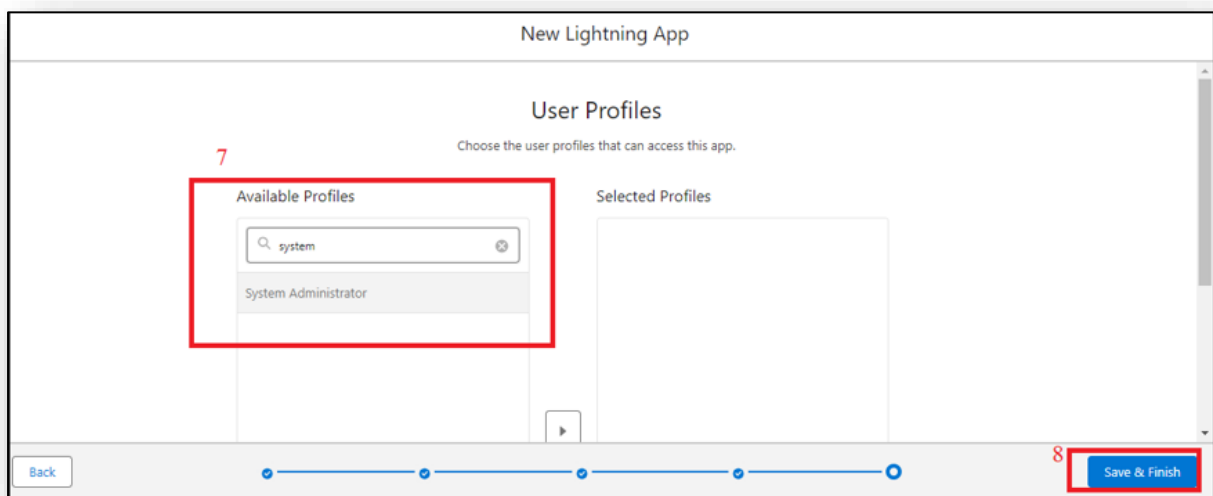


6. From Available Items, select Banquet Halls, Billings, Staff, Reports, and Dashboards and move them to Selected Item and Click Next.

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



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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.
9. Click on Next, Next and Save.



# A CRM APPLICATION FOR BANQUET HALL BOOKING

| Custom Field Definition Detail |                                     |             |              | Edit | Set Field-Level Security | View Field Accessibility            | Where 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                     | Likhitha Kulala, 6/2/2025, 10:19 PM |             |              |      | Modified By              | Likhitha Kulala, 6/2/2025, 10:19 PM |                     |

| Values   |         |          |                          |                      |                                     | New             | Reorder             | Replace          | Printable View | Chart Colors |  |
|--|---------|----------|--------------------------|----------------------|-------------------------------------|-----------------|---------------------|------------------|----------------|--------------|--|
|  |         |          |                          |                      |                                     | Delete Selected | Deactivate Selected | Replace Selected |                |              |  |
| <input type="checkbox"/> Action  | Values  | API Name | Default                  | Chart Colors         | Modified By                         |                 |                     |                  |                |              |  |
| <input type="checkbox"/>   <a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a> | Morning | Morning  | <input type="checkbox"/> | Assigned dynamically | Likhitha Kulala, 6/2/2025, 10:19 PM |                 |                     |                  |                |              |  |
| <input type="checkbox"/>   <a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a> | Evening | Evening  | <input type="checkbox"/> | Assigned dynamically | Likhitha Kulala, 6/2/2025, 10:19 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 |                                     |             |              | Edit | Set Field-Level Security | View Field Accessibility            | Where 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                     | Likhitha Kulala, 6/2/2025, 10:24 PM |             |              |      | Modified By              | Likhitha Kulala, 6/2/2025, 10:24 PM |                     |

## 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.

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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.

| Custom Field Definition Detail |                                    | Edit        | Set Field-Level Security | View Field Accessibility          | Where is this used? |
|--------------------------------|------------------------------------|-------------|--------------------------|-----------------------------------|---------------------|
| <b>Field Information</b>       |                                    |             |                          |                                   |                     |
| 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                     | Likitha Kulala, 6/3/2025, 12:04 AM |             | Modified By              | Likitha Kulala, 6/3/2025, 9:32 PM |                     |

| Values   |              |              |                          |                      |                                    |
|--|--------------|--------------|--------------------------|----------------------|------------------------------------|
| <div> New Reorder Replace Printable View Chart Colors </div> <div> Delete Selected Deactivate Selected Replace Selected </div> |              |              |                          |                      |                                    |
| <input type="checkbox"/> Action  | Values       | API Name     | Default                  | Chart Colors         | Modified By                        |
| <input type="checkbox"/> Edit   Del   Deactivate   | Reception    | Reception    | <input type="checkbox"/> | Assigned dynamically | Likitha Kulala, 6/3/2025, 12:04 AM |
| <input type="checkbox"/> Edit   Del   Deactivate   | Anniversary  | Anniversary  | <input type="checkbox"/> | Assigned dynamically | Likitha Kulala, 6/3/2025, 12:04 AM |
| <input type="checkbox"/> Edit   Del   Deactivate   | Birthday     | Birthday     | <input type="checkbox"/> | Assigned dynamically | Likitha Kulala, 6/3/2025, 12:04 AM |
| <input type="checkbox"/> Edit   Del   Deactivate   | Other Events | Other Events | <input type="checkbox"/> | Assigned dynamically | Likitha Kulala, 6/3/2025, 12:04 AM |

## 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.
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.

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| Custom Field Definition Detail |                                     | Edit        | Set Field-Level Security | View Field Accessibility            | Where is this used? |
|--------------------------------|-------------------------------------|-------------|--------------------------|-------------------------------------|---------------------|
| <b>Field Information</b>       |                                     |             |                          |                                     |                     |
| 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                     | Likhitha Kulala, 6/2/2025, 11:58 PM |             | Modified By              | Likhitha Kulala, 6/2/2025, 11:58 PM |                     |
| <b>General Options</b>         |                                     |             |                          |                                     |                     |
| Required                       | <input checked="" type="checkbox"/> |             |                          |                                     |                     |
| Default Value                  | <input type="text"/>                |             |                          |                                     |                     |

Values

NewReorderReplacePrintable ViewChart Colors

Delete SelectedDeactivate SelectedReplace Selected

| <input type="checkbox"/> Action  | Values       | API Name     | Default                  | Chart Colors         | Modified By                         |
|--|--------------|--------------|--------------------------|----------------------|-------------------------------------|
| <input type="checkbox"/> <a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a> | Veg          | Veg          | <input type="checkbox"/> | Assigned dynamically | Likhitha Kulala, 6/2/2025, 11:58 PM |
| <input type="checkbox"/> <a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a> | Speacial Veg | Speacial Veg | <input type="checkbox"/> | Assigned dynamically | Likhitha Kulala, 6/2/2025, 11:58 PM |
| <input type="checkbox"/> <a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a> | Non-Veg      | Non-Veg      | <input type="checkbox"/> | Assigned dynamically | Likhitha Kulala, 6/2/2025, 11:58 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.

| Custom Field Definition Detail |                                     | Edit        | Set Field-Level Security | View Field Accessibility            | Where is this used? |
|--------------------------------|-------------------------------------|-------------|--------------------------|-------------------------------------|---------------------|
| <b>Field Information</b>       |                                     |             |                          |                                     |                     |
| Field Label                    | No of Visitors                      | Object Name | Banquet Hall             |                                     |                     |
| Field Name                     | No_of_Visitors                      | Data Type   | Number                   |                                     |                     |
| API Name                       | No_of_Visitors__c                   |             |                          |                                     |                     |
| Description                    |                                     |             |                          |                                     |                     |
| Help Text                      |                                     |             |                          |                                     |                     |
| Data Owner                     |                                     |             |                          |                                     |                     |
| Field Usage                    |                                     |             |                          |                                     |                     |
| Data Sensitivity Level         |                                     |             |                          |                                     |                     |
| Compliance Categorization      |                                     |             |                          |                                     |                     |
| Created By                     | Likhitha Kulala, 6/2/2025, 10:27 PM |             | Modified By              | Likhitha Kulala, 6/2/2025, 10:27 PM |                     |

# A CRM APPLICATION FOR BANQUET HALL BOOKING

## 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.

| Custom Field Definition Detail |                                     |             |              | Edit        | Set Field-Level Security            | View Field Accessibility | Where is this used? |
|--------------------------------|-------------------------------------|-------------|--------------|-------------|-------------------------------------|--------------------------|---------------------|
| Field Information              |                                     |             |              |             |                                     |                          |                     |
| Field Label                    | Email                               | Object Name | Banquet Hall |             |                                     |                          |                     |
| Field Name                     | Email                               | Data Type   | Email        |             |                                     |                          |                     |
| API Name                       | Email__c                            |             |              |             |                                     |                          |                     |
| Description                    |                                     |             |              |             |                                     |                          |                     |
| Help Text                      |                                     |             |              |             |                                     |                          |                     |
| Data Owner                     |                                     |             |              |             |                                     |                          |                     |
| Field Usage                    |                                     |             |              |             |                                     |                          |                     |
| Data Sensitivity Level         |                                     |             |              |             |                                     |                          |                     |
| Compliance Categorization      |                                     |             |              |             |                                     |                          |                     |
| Created By                     | Likhitha Kulala, 6/2/2025, 10:56 PM |             |              | Modified By | Likhitha Kulala, 6/3/2025, 12:14 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.
4. Select Data type as “Phone” and click Next.
5. Enter Field Label as “Phone No”.
6. Click on Next, Next and Save.

| Custom Field Definition Detail |                                     |             |              | Edit        | Set Field-Level Security            | View Field Accessibility | Where 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                     | Likhitha Kulala, 6/2/2025, 10:49 PM |             |              | Modified By | Likhitha Kulala, 6/2/2025, 10:49 PM |                          |                     |

# A CRM APPLICATION FOR BANQUET HALL BOOKING

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

| Field Information         |  |
|---------------------------|--|
| Field Label               | Archestra  |
| Field Name                | Archestra  |
| API Name                  | Archestra__c   |
| Description               |  |
| Help Text                 |  |
| Data Owner                |  |
| Field Usage               |  |
| Data Sensitivity Level    |  |
| Compliance Categorization |  |
| Created By                | <a href="#">Likhitha Kulala</a> , 6/2/2025, 11:29 PM |
| Modified By               | <a href="#">Likhitha Kulala</a> , 6/2/2025, 11:29 PM |

## 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.

# A CRM APPLICATION FOR BANQUET HALL BOOKING

DJ

[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               | DJ                                   | Object Name | Banquet Hall                         |
| Field Name                | DJ                                   | Data Type   | Checkbox                             |
| API Name                  | DJ__c                                |             |                                      |
| Description               |                                      |             |                                      |
| Help Text                 |                                      |             |                                      |
| Data Owner                |                                      |             |                                      |
| Field Usage               |                                      |             |                                      |
| Data Sensitivity Level    |                                      |             |                                      |
| Compliance Categorization |                                      |             |                                      |
| Created By                | Likhiitha Kulala, 6/2/2025, 10:46 PM | Modified By | Likhiitha Kulala, 6/2/2025, 10:46 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.

Shehnai and Mridangam

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

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

**Field Information**

|                           |                                      |             |                                      |
|---------------------------|--------------------------------------|-------------|--------------------------------------|
| Field Label               | Shehnai and Mridangam                | Object Name | Banquet Hall                         |
| Field Name                | Shehnai_and_Mridangam                | Data Type   | Checkbox                             |
| API Name                  | Shehnai_and_Mridangam__c             |             |                                      |
| Description               |                                      |             |                                      |
| Help Text                 |                                      |             |                                      |
| Data Owner                |                                      |             |                                      |
| Field Usage               |                                      |             |                                      |
| Data Sensitivity Level    |                                      |             |                                      |
| Compliance Categorization |                                      |             |                                      |
| Created By                | Likhiitha Kulala, 6/2/2025, 11:41 PM | Modified By | Likhiitha Kulala, 6/2/2025, 11:41 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.

# A CRM APPLICATION FOR BANQUET HALL BOOKING

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

Banquet Hall Custom Field: Magician ~ Salesforce - Developer Edition

|                           |                                     |             |                                     |
|---------------------------|-------------------------------------|-------------|-------------------------------------|
| 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                | Likhitha Kulala, 6/2/2025, 11:37 PM | Modified By | Likhitha Kulala, 6/2/2025, 11:37 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 “Kolatham”.
6. Click on Next, Next and Save.

### Kolatam

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Validation Rules [0]

**Custom Field Definition Detail**

EditSet Field-Level SecurityView Field AccessibilityWhere 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                | Likhitha Kulala, 6/2/2025, 11:51 PM | Modified By | Likhitha Kulala, 6/2/2025, 11:51 PM |

## A CRM APPLICATION FOR BANQUET HALL BOOKING

### Object Name – Billing

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



# A CRM APPLICATION FOR BANQUET HALL BOOKING

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**

EditSet Field-Level SecurityView Field AccessibilityWhere is this used?

| Field Information         |                                     |
|---------------------------|-------------------------------------|
| Field Label               | Customer Name                       |
| Field Name                | Customer_Name                       |
| API Name                  | Customer_Name__c                    |
| Description               |                                     |
| Help Text                 |                                     |
| Data Owner                |                                     |
| Field Usage               |                                     |
| Data Sensitivity Level    |                                     |
| Compliance Categorization |                                     |
| Created By                | Likhitha Kulala, 6/2/2025, 10:43 PM |
| Modified By               | Likhitha Kulala, 6/2/2025, 10:43 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. 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**

EditSet Field-Level SecurityView Field AccessibilityWhere 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                | Likhitha Kulala, 6/3/2025, 10:35 PM |
| Modified By               | Likhitha Kulala, 6/3/2025, 10:35 PM |

# A CRM APPLICATION FOR BANQUET HALL BOOKING

## 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 Orchestra Amount
6. Select formula return type Currency, Click Next
7. Create and insert Advance formula: IF (Customer\_Name\_\_r. Orchestra\_\_c = TRUE, 50000, 0)
8. Click Next, Next, then Save.

Archestra Amount

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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                | Likhitha Kulala, 6/2/2025, 11:30 PM | Modified By | Likhitha Kulala, 6/2/2025, 11:30 PM |

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

**Field Information**

|                           |                                     |             |                                    |
|---------------------------|-------------------------------------|-------------|------------------------------------|
| Field Label               | DJ Amount                           | Object Name | <a href="#">Billing</a>            |
| Field Name                | DJ_Amount                           |             |                                    |
| API Name                  | DJ_Amount__c                        |             |                                    |
| Description               |                                     |             |                                    |
| Help Text                 |                                     |             |                                    |
| Data Owner                |                                     |             |                                    |
| Field Usage               |                                     |             |                                    |
| Data Sensitivity Level    |                                     |             |                                    |
| Compliance Categorization |                                     |             |                                    |
| Created By                | Likhitha Kulala, 6/2/2025, 11:33 PM | Modified By | Likhitha Kulala, 6/6/2025, 8:30 AM |

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

**Field Information**

|                           |                                     |             |                                     |
|---------------------------|-------------------------------------|-------------|-------------------------------------|
| Field Label               | Magician Amount                     | Object Name | <a href="#">Billing</a>             |
| Field Name                | Magician_Amount                     |             |                                     |
| API Name                  | Magician_Amount__c                  |             |                                     |
| Description               |                                     |             |                                     |
| Help Text                 |                                     |             |                                     |
| Data Owner                |                                     |             |                                     |
| Field Usage               |                                     |             |                                     |
| Data Sensitivity Level    |                                     |             |                                     |
| Compliance Categorization |                                     |             |                                     |
| Created By                | Likhitha Kulala, 6/2/2025, 11:38 PM | Modified By | Likhitha Kulala, 6/2/2025, 11:38 PM |

## 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.

## A CRM APPLICATION FOR BANQUET HALL BOOKING

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.

**Shehnai and Mridangam Amount**  
[Back to Billing](#)

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

|                           |                                     |
|---------------------------|-------------------------------------|
| <b>Field Information</b>  |                                     |
| Field Label               | Shehnai and Mridangam Amount        |
| Field Name                | Shehnai_and_Mridangam_Amount        |
| API Name                  | Shehnai_and_Mridangam_Amount__c     |
| Description               |                                     |
| Help Text                 |                                     |
| Data Owner                |                                     |
| Field Usage               |                                     |
| Data Sensitivity Level    |                                     |
| Compliance Categorization |                                     |
| Created By                | Likhitha Kulala, 6/2/2025, 11:48 PM |
| Modified By               | Likhitha Kulala, 6/2/2025, 11:48 PM |

### 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)
8. Click Next, Next, then Save.

# A CRM APPLICATION FOR BANQUET HALL BOOKING

**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               |                                     |             |                                     |
| Data Sensitivity Level    |                                     |             |                                     |
| Compliance Categorization |                                     |             |                                     |
| Created By                | Likhitha Kulala, 6/2/2025, 11:52 PM | Modified By | Likhitha Kulala, 6/2/2025, 11:52 PM |

## 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**

EditSet Field-Level SecurityView Field AccessibilityWhere 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                | Likhitha Kulala, 6/3/2025, 12:00 AM | Modified By | Likhitha Kulala, 6/3/2025, 12:00 AM |

**Formula Options**

|                |   |
|----------------|---|
| Data Type      | Formula  |
| Decimal Places | 2   |

CASE( Customer\_Name\_\_r.Food\_Menu\_\_c, 'Veg', 450,  
Special Veg', 550,  
Non-Veg', 550, 650)

## 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:  
Food\_Amount\_per\_Plate\_\_c \* Customer\_Name\_\_r. No\_of\_Visitors\_\_c
8. Click Next, Next, then Save.

# A CRM APPLICATION FOR BANQUET HALL BOOKING


**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                | Likhittha Kulala, 6/3/2025, 12:02 AM | Modified By | Likhittha Kulala, 6/3/2025, 12:02 AM |

**Formula Options**

|                |   |
|----------------|---|
| Data Type      | Formula  |
| Decimal Places | 2   |

Food\_Amount\_per\_Plate\_\_c \* Customer\_Name\_\_r.No\_of\_Visitors\_\_c

## 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.

# A CRM APPLICATION FOR BANQUET HALL BOOKING

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                | Likhitha Kulala, 6/3/2025, 12:08 AM | Modified By | Likhitha Kulala, 6/3/2025, 12:08 AM |

Formula Options

|                |         |
|----------------|---------|
| Data Type      | Formula |
| Decimal Places | 2       |

CASE( Customer\_Name\_\_r.Decoration\_Purpose\_\_c, 'Marriage', 50000,  
'Reception', 60000,  
'Anniversary', 30000,  
'Birthday', 25000 ,  
'Other Events', 20000 , 0)

## Field Name – Total Bill Amount

- Go to setup --> click on Object Manager --> type object name (Billing) in quick find box--> click on the Billing object.
- Now click on “Fields & Relationships”
- Click on New.
- Select Data type as “Formula” and click Next.
- Enter field label Decoration Amount
- Select formula return type Currency, Click Next
- Create and insert Advance formula:

$$\text{Decoration\_Amount\_c} + \text{Food\_Amountc} + \text{DJ\_Amountc} + \text{Archestra\_Amountc} + \text{Kolatham\_Amountc} + \text{Magician\_Amountc} + \text{Shehnai\_and\_Mridangam\_Amount\_c}$$
- Click Next, Next, then Save.



# A CRM APPLICATION FOR BANQUET HALL BOOKING

**Total Bill Amount**  
[Back to Billing](#)

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

**Field Information**

|                           |                                     |             |                                     |
|---------------------------|-------------------------------------|-------------|-------------------------------------|
| Field Label               | Total Bill Amount                   | Object Name | Billing                             |
| Field Name                | Total_Bill_Amount                   |             |                                     |
| API Name                  | Total_Bill_Amount__c                |             |                                     |
| Description               |                                     |             |                                     |
| Help Text                 |                                     |             |                                     |
| Data Owner                |                                     |             |                                     |
| Field Usage               |                                     |             |                                     |
| Data Sensitivity Level    |                                     |             |                                     |
| Compliance Categorization |                                     |             |                                     |
| Created By                | Likhiitha Kulala, 6/3/2025, 9:05 PM | Modified By | Likhiitha Kulala, 6/3/2025, 9:05 PM |

**Formula Options**

|  |         |
|--|---------|
| Data Type  | Formula |
| Decimal Places   | 2       |
| Decoration_Amount__c + Food_Amount__c + DJ_Amount__c + Archestra_Amount__c + Kolatam_Amount__c + Magician_Amount__c+ Shehnai_and_Mridangam_Amount__c |         |

## Object Name – Staff

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

# A CRM APPLICATION FOR BANQUET HALL BOOKING

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

**Position**  
[Back to Staff](#)

Validation Rules [0]

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

**Field Information**

|                           |                                      |             |                                      |
|---------------------------|--------------------------------------|-------------|--------------------------------------|
| 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                | Likhittha Kulala, 6/3/2025, 11:54 PM | Modified By | Likhittha Kulala, 6/3/2025, 11:54 PM |

**General Options**

|                |                          |
|----------------|--------------------------|
| Required       | <input type="checkbox"/> |
| Unique         | <input type="checkbox"/> |
| Case Sensitive | <input type="checkbox"/> |
| External ID    | <input type="checkbox"/> |
| Default Value  |                          |

## 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.

# A CRM APPLICATION FOR BANQUET HALL BOOKING

### Salary

[Back to Staff](#)

Validation Rules (0)

**Custom Field Definition Detail**

EditSet Field-Level SecurityView Field AccessibilityWhere is this used?

**Field Information**

|                           |                                     |             |                                     |
|---------------------------|-------------------------------------|-------------|-------------------------------------|
| 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                | Likhitha Kulala, 6/3/2025, 11:55 PM | Modified By | Likhitha Kulala, 6/3/2025, 11:55 PM |

**General Options**

|               |                          |
|---------------|--------------------------|
| Required      | <input type="checkbox"/> |
| Default Value |                          |

**Currency Options**

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

### 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                | Likhitha Kulala, 6/3/2025, 11:56 PM | Modified By | Likhitha Kulala, 6/3/2025, 11:56 PM |

**General Options**

|               |                          |
|---------------|--------------------------|
| Required      | <input type="checkbox"/> |
| Default Value |                          |

# A CRM APPLICATION FOR BANQUET HALL BOOKING

## 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

### 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                | Likhiitha Kulala, 6/3/2025, 11:53 PM | Modified By | Likhiitha Kulala, 6/3/2025, 11:53 PM |

**General Options**

|               |                          |
|---------------|--------------------------|
| Required      | <input type="checkbox"/> |
| Default Value |                          |

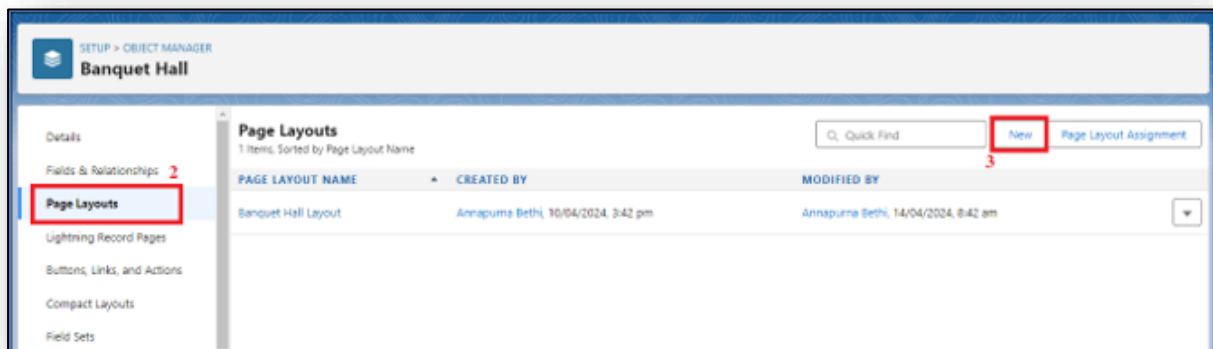
# A CRM APPLICATION FOR BANQUET HALL BOOKING

## Milestone 6

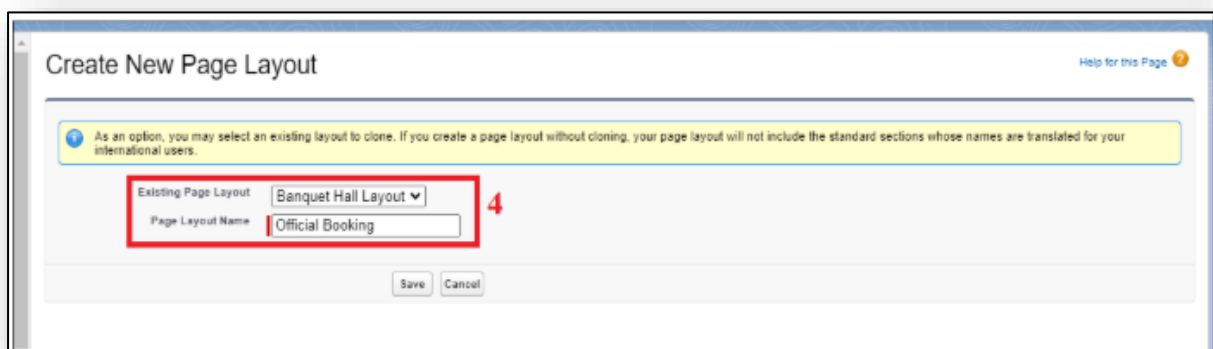
### Creation of Page Layouts

#### 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



# A CRM APPLICATION FOR BANQUET HALL BOOKING

5. Drag and arrange the field as shown below

The screenshot shows the 'Banquet Hall Detail' form. At the top, there is a toolbar with buttons: Save, Quick Save, Preview As..., Cancel, Undo, Redo, and Layout Properties. Below this is a 'Fields' panel on the left with a list of fields: Buttons, Quick Actions, Mobile & Lightning Actions, Expanded Lookups, Related Lists, and Report Charts. A 'Quick Find' box is next to the fields list. The main area of the form is divided into two sections. The top section is a table with columns: Section, Created By, Email, Magician, and Record Type. The bottom section is a form with fields: Customer Name, Food Menu, No of Visitors, Shehnai and Mrida..., Archestra, Decoration Purpose, Kolatam, Owner, Timings, Booking Date, DJ, Last Modified By, and Phone No. The 'Banquet Hall Detail' section has a 'Standard Buttons' bar with buttons: Edit, Delete, Clone, Change Owner, Change Record Type, Printable View, Sharing, Sharing Hierarchy, and Edit Labels. Below this is an 'Information' section with a header 'Information (Header visible on edit only)'. It contains a list of fields with status icons (red star, blue circle, green checkmark) and values: Customer Name (Sample Text), Booking Date (6/6/2025), Timings (Sample Text), Phone No (1-415-555-1212), Food Menu (Sample Text), No of Visitors (87,904), Email (sarah.sample@company.com), and DJ (checked).

## 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.

The screenshot shows the 'Banquet Hall' object manager page. The left sidebar has a 'Details' section with a 'Page Layouts' link highlighted. The main area is titled 'Page Layouts' and shows a table with columns: PAGE LAYOUT NAME, CREATED BY, and MODIFIED BY. The table contains one row: Banquet Hall Layout, Annapurna Bethi, 10/04/2024, 3:42 pm, and Annapurna Bethi, 14/04/2024, 8:42 am. A 'New' button is highlighted in the top right corner of the table area.

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

# A CRM APPLICATION FOR BANQUET HALL BOOKING

- Click on Save

Create New Page Layout

As an option, you may select an existing layout to clone. If you create a page layout without cloning, your page layout will not include the standard sections whose names are translated for your international users.

Existing Page Layout: Banquet Hall Layout

Page Layout Name: Official Booking

Save Cancel

5. Drag and arrange the field as shown below

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields

Buttons

Quick Actions

Mobile & Lightning Actions

Expanded Lookups

Related Lists

Report Charts

Quick Find: Field Name

| Section      | Created By         | Email            | Magician       | Record Type          |
|--------------|--------------------|------------------|----------------|----------------------|
| Blank Space  | Customer Name      | Food Menu        | No of Visitors | Shehnai and Mrida... |
| Archestra    | Decoration Purpose | Kolatam          | Owner          | Timings              |
| Booking Date | DJ                 | Last Modified By | Phone No       |                      |

Customer Details

★ Customer Name Sample Text

Phone No 1-415-555-1212

★ Email sarah.sample@company.com

Information (Header visible on edit only)

★ Booking Date 6/6/2025

★ Timings Sample Text

★ Decoration Purpose Sample Text

★ Food Menu Sample Text

★ No of Visitors 10,258

Shehnai and Mridangam ☒

DJ ☒

Kolatam ☒

Magician ☒

Archestra ☒

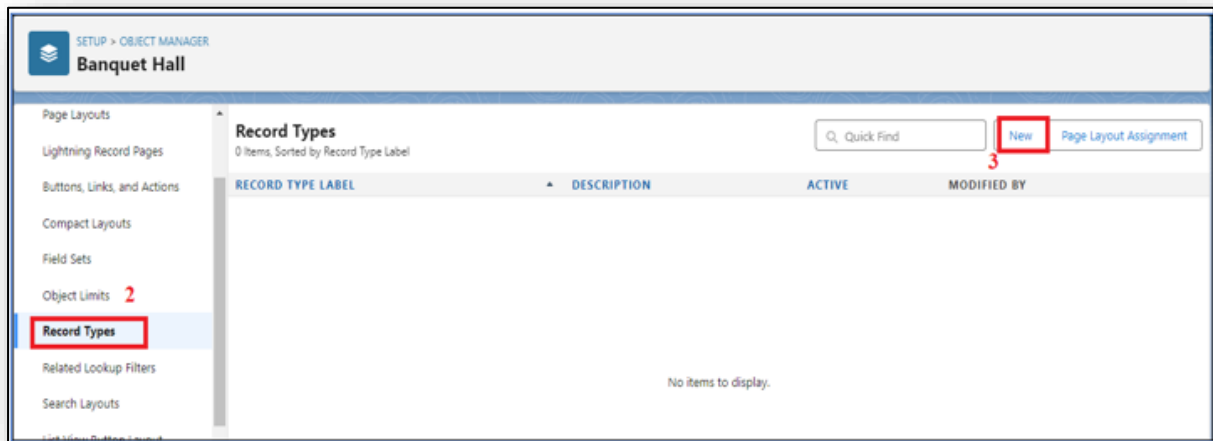
Owner Sample Text

# 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 Types: Master
  - Record Type Label: Official Booking
  - Record Type Name: Official\_Booking
  - Active: Tick checkbox



# A CRM APPLICATION FOR BANQUET HALL BOOKING

**Step 1. Enter the details** Step 1 of 2

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:

Record Type Label:

Record Type Name:

Description:

Active: ☒

**\* Required Information**

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"/>                |                                       |
| Analytics Cloud Security User    |                                  | <input checked="" type="checkbox"/>                |                                       |

Activate Windows  
Go to Settings to activate Windows.

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

**Step 2. Assign page layouts** Step 2 of 2

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

☒ Apply one layout to all profiles

**Profile:**

| Profile                          | Page Layout                                   |
|----------------------------------|---|
| Analytics Cloud Integration User | <input type="text" value="Official Booking"/> |
| Analytics Cloud Security User    | <input type="text" value="Official Booking"/> |

7. Click on Save.

# A CRM APPLICATION FOR BANQUET HALL BOOKING

**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 | Official Booking                             | Active      | ✓                                   |
| Record Type Name  | Official_Booking                             |             |                                     |
| Namespace Prefix  |  |             |                                     |
| Description       | It is for Official Meetings,lunch,gatherings |             |                                     |
| Created By        | Likhiitha Kulala, 6/3/2025, 9:51 PM          | Modified By | Likhiitha Kulala, 6/3/2025, 9:51 PM |

**Picklists Available for Editing**

| Action               | Field              | Modified Date     |
|----------------------|--------------------|-------------------|
| <a href="#">Edit</a> | Decoration Purpose | 6/3/2025, 9:51 PM |
| <a href="#">Edit</a> | Food Menu          | 6/3/2025, 9:51 PM |
| <a href="#">Edit</a> | Timings            | 6/3/2025, 9:51 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 2  
**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. |             |        |             |

4. Enter the details: For Record Types
  - Existing Record Types: Master
  - Record Type Label: Celebrations
  - Record Type Name: Celebrations

# A CRM APPLICATION FOR BANQUET HALL BOOKING

- Active: Tick checkbox.

Step 1. Enter the details Step 1 of 2

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** ❗ Required Information

Existing Record Type: --Master--

Record Type Label: Celebrations

Record Type Name: Celebrations

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

Active: ☒

4

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"/>              |

Activate Windows  
Go to Settings to activate Windows.

5. Click on Next

6. In Assign Page Layout

- Apply one layout to all profiles: Select Celebrations

Step 2. Assign page layouts Step 2 of 2

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 Celebrations

☐ Apply a different layout for each profile

6

| Profile:                         | Page Layout  |
|----------------------------------|--------------|
| Analytics Cloud Integration User | Celebrations |
| Analytics Cloud Security User    | Celebrations |
| Chatter External User            |              |

Activate Windows  
Go to Settings to activate Windows.

6. Click on Save.

# A CRM APPLICATION FOR BANQUET HALL BOOKING

## 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 ☒

Record Type Name Celebrations

Namespace Prefix

Description

Created By [Likhitha Kulala](#), 6/4/2025, 12:37 AM

Modified By [Likhitha Kulala](#), 6/4/2025, 12:37 AM

### Picklists Available for Editing

| Action               | Field              | Modified Date      |
|----------------------|--------------------|--------------------|
| <a href="#">Edit</a> | Decoration Purpose | 6/4/2025, 12:37 AM |
| <a href="#">Edit</a> | Food Menu          | 6/4/2025, 12:37 AM |
| <a href="#">Edit</a> | Timings            | 6/4/2025, 12:37 AM |

# 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 Salesforce Validation Rule configuration page. The 'Rule Name' field is populated with '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 on the right shows 'ABS' selected. 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.

# A CRM APPLICATION FOR BANQUET HALL BOOKING

### Error Message

Example: Discount percent cannot exceed 30%

This message will appear when Error Condition formula is true

Error Message

Booking Date must be a future Date

This error message can either appear at the top of the page or below a specific field on the page

Error Location

☐ Top of Page ☒ Field 

Booking Date

Save

Save & New

Cancel

### 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              | Likhitha Kulala, 6/3/2025, 9:59 PM | Modified By    | Likhitha Kulala, 6/3/2025, 9:59 PM  |

Edit

Clone

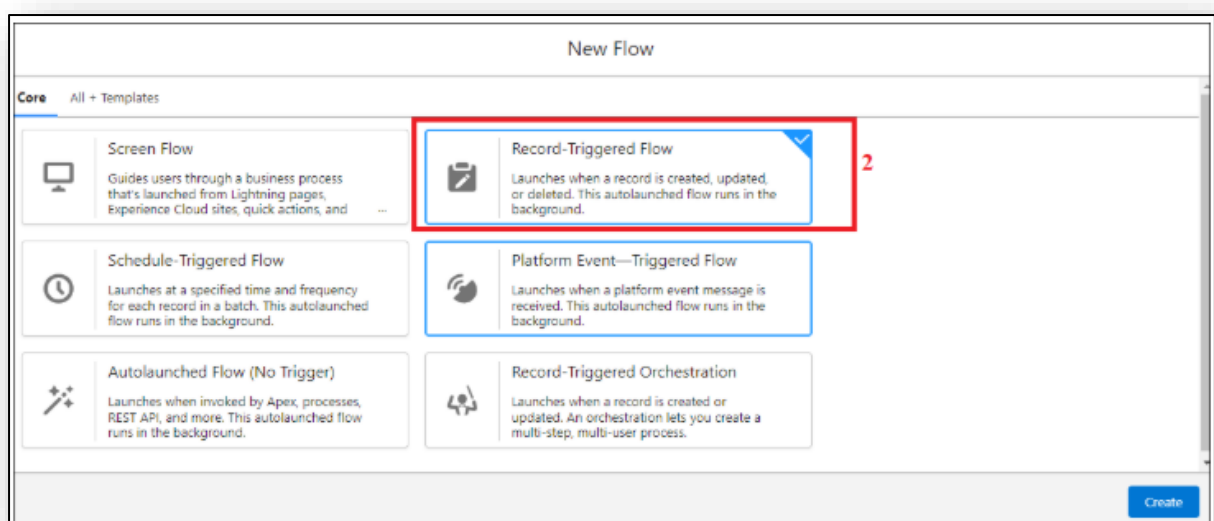
# A CRM APPLICATION FOR BANQUET HALL BOOKING

## 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.

**Select Object**

Select the object whose records trigger the flow when they're created, updated, or deleted.

\* Object 3

Banquet Hall

**Configure Trigger**

\* Trigger the Flow When: 4

☒ A record is created

☐ A record is updated

☐ A record is created or updated

☐ A record is deleted

5. Set Entry Conditions: None

# A CRM APPLICATION FOR BANQUET HALL BOOKING

## 6. Select Fast Field Updates.

**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

\* Optimize the Flow for:

**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  
Duplicate Checking for Banquet Hall

\* API Name  
Duplicate\_Checking\_for\_Banquet\_Hall

Description

Get Records of This Object

\* Object  
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) ▼

Field Operator Value

Booking\_Date\_\_c Equals \$Record > Booking Date ✕

AND Timings\_\_c Equals \$Record > Timings ✕

+ 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 18

Banquet Hall Booking Error Message

\*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 20

+ 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.

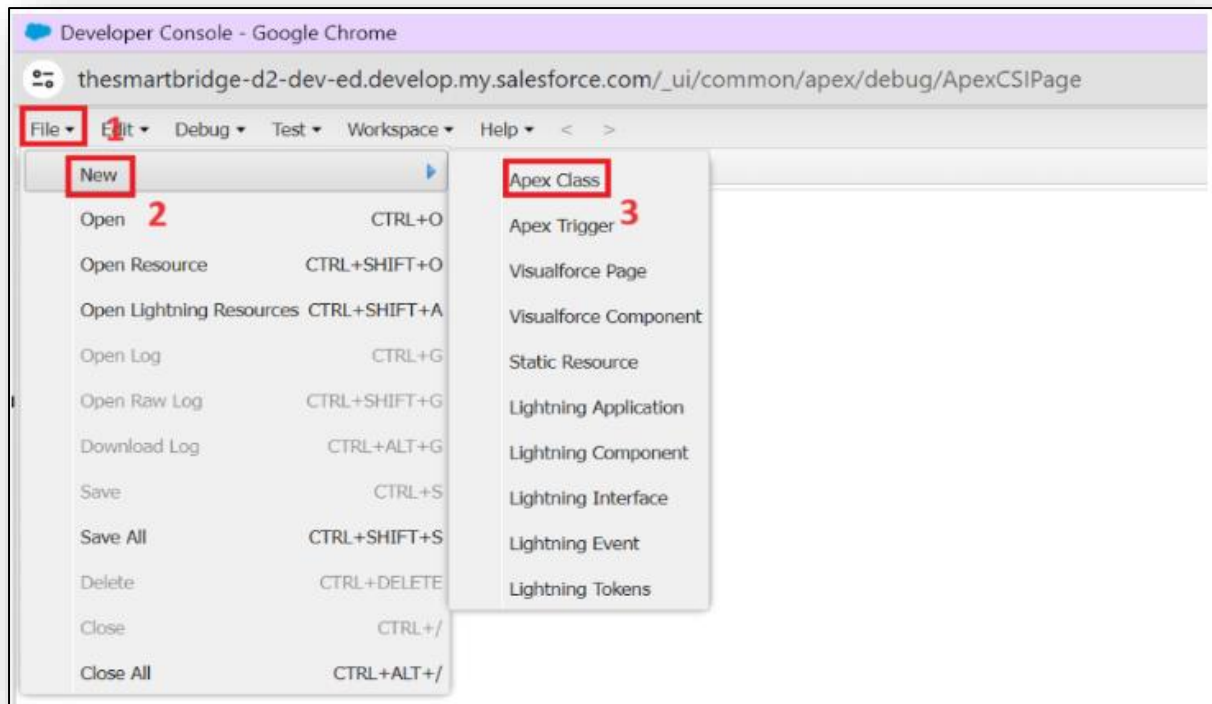
Step 3:

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.

# A CRM APPLICATION FOR BANQUET HALL BOOKING



**Give Class Name:** BillingTriggerHandlerClass

**Create an Apex Class:**

```
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;
        }
    }
}
```

## A CRM APPLICATION FOR BANQUET HALL BOOKING

```
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);  
        }  
    }  
}
```

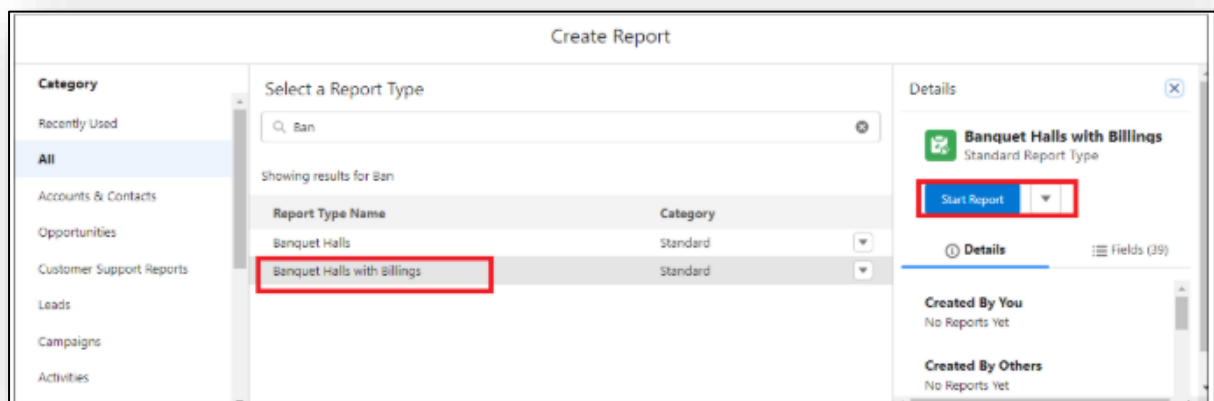
# A CRM APPLICATION FOR BANQUET HALL BOOKING

## Milestone 11

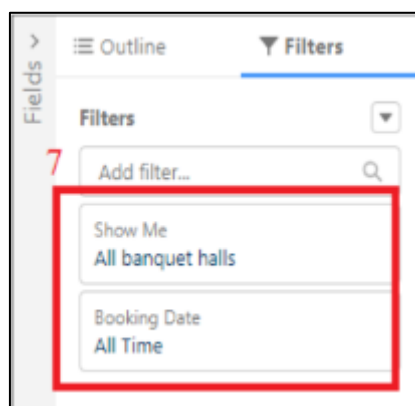
### Reports

#### Activity 1: Create a Summary Report

1. 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.

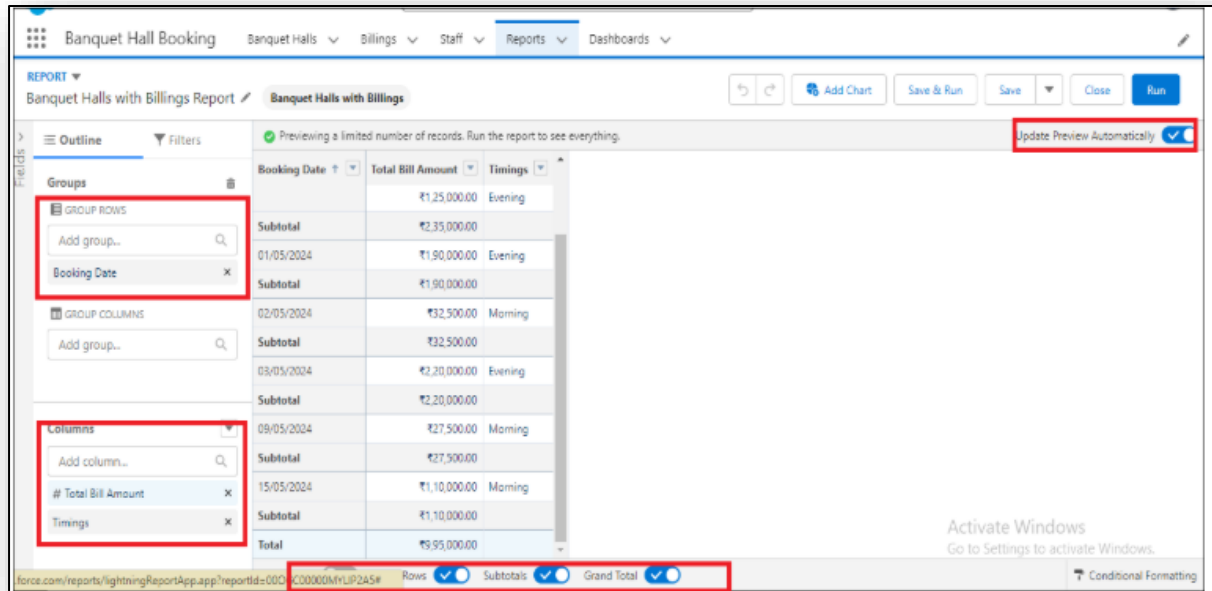


## A CRM APPLICATION FOR BANQUET HALL BOOKING

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 select in "Select a report type option")



### 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.

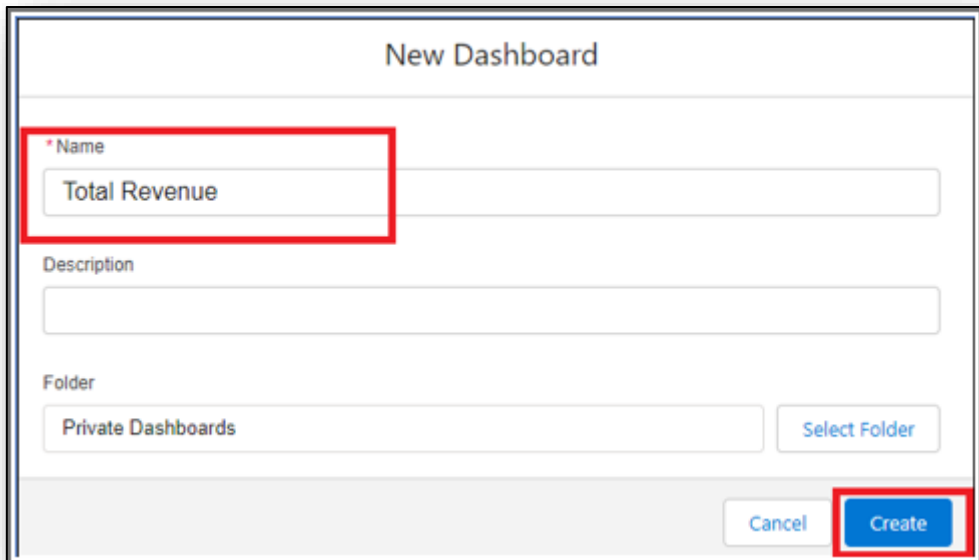
# A CRM APPLICATION FOR BANQUET HALL BOOKING

## 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

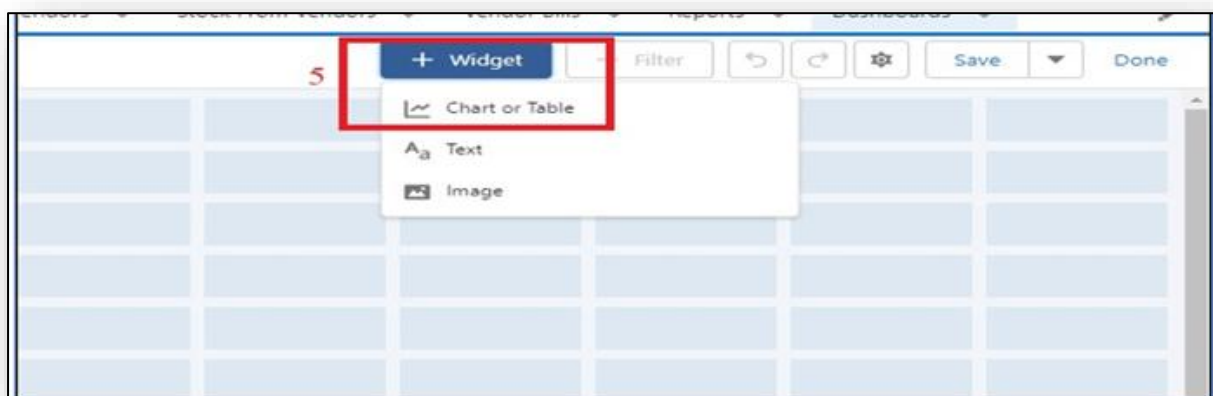
\* Name  
Total Revenue

Description

Folder  
Private Dashboards [Select Folder](#)

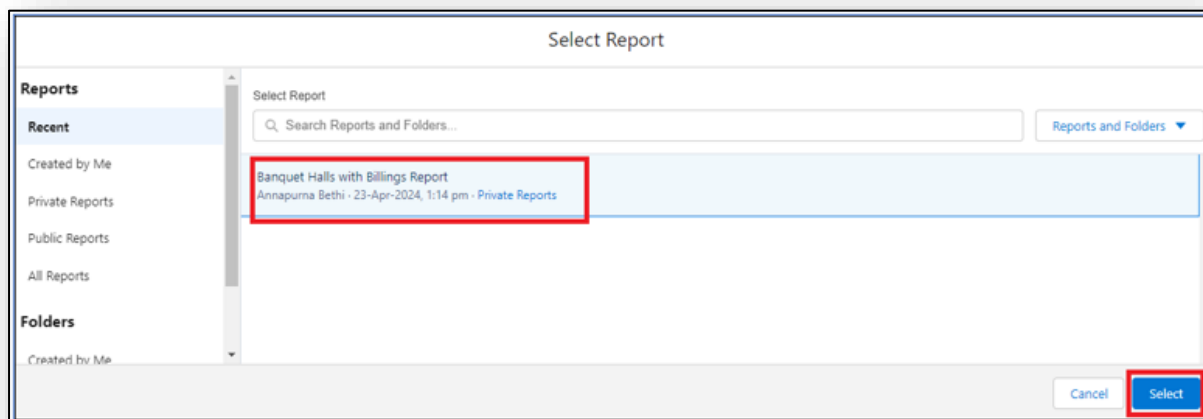
[Cancel](#) [Create](#)

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

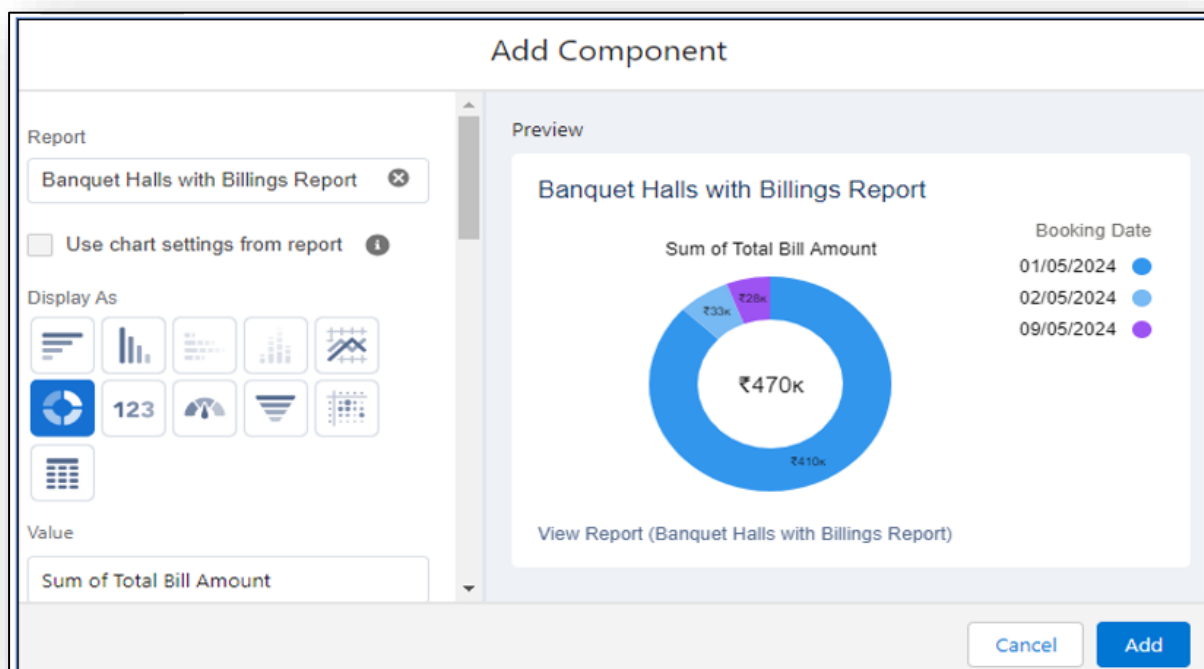


6. Select the Banquet Halls with Billings Report.

## A CRM APPLICATION FOR BANQUET HALL BOOKING



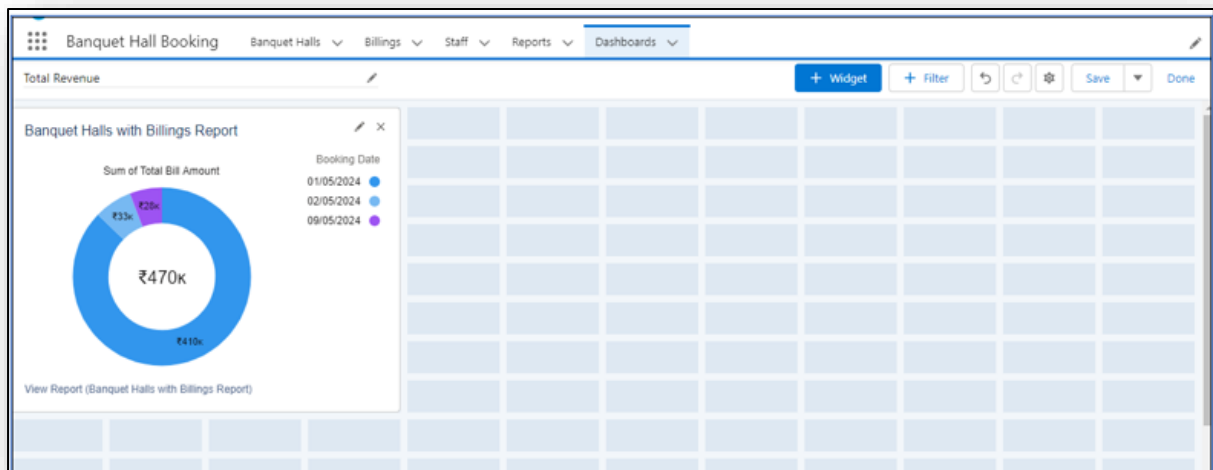
7. For the data visualization select any of the charts, tables etc. as per your choice/requirement.
8. Click add.
9. Click save.



# 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



# A CRM APPLICATION FOR BANQUET HALL BOOKING

## Outputs: -

Banquet Halls Click New ↓

### New Banquet Hall

Select a record type

☒ Official Booking  
It is for official Meetings,Lunch, gatherings

☐ Celebrations  
It is for mariages, birthday parties, receptions etc

CancelNext


Select one option (Official Booking)

### New Banquet Hall: Official Booking

\* = Required Information

#### Information

\* Customer Name

Owner  
 DEEPAK DEEPAK

\* Booking Date

\* Timings

--None--

Phone No

\* Food Menu

--None--

\* No of Visitors

\* Email

CancelSave & NewSave

Select another option (Celebrations)

### New Banquet Hall: Celebrations

\* = Required Information

#### Customer Details


\* Customer Name

Phone No

\* Email

#### Information

\* Booking Date

Owner  
 DEEPAK DEEPAK

\* Timings

--None--

\* Decoration Purpose

None

CancelSave & NewSave

# A CRM APPLICATION FOR BANQUET HALL BOOKING

Billing section click New

New Billing

\* = Required Information

Information

Billing No

\* Customer Name

Search Banquet Halls...

\* Email

Cancel

Save & New

Save

Staffs section Click New

New Staff

\* = Required Information

Information

\* Staff Name

Owner

DEEPAK DEEPAK

Position

Salary

Phone No

Date of Joining

Cancel

Save & New

Save

Reports screen

Banquet Hall Booking

Banquet Halls

Billings

Staffs

Reports

Dashboards

Search...

★

📄

🔍

⚙️

🔔

👤

Report: Banquet Halls with Billings

Banquet Halls with Billings Report

Enable Field Editing

🔍

Add Chart

📄

Edit

Total Records

2

Total Total Bill Amount

\$195,000.00

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

Row Counts

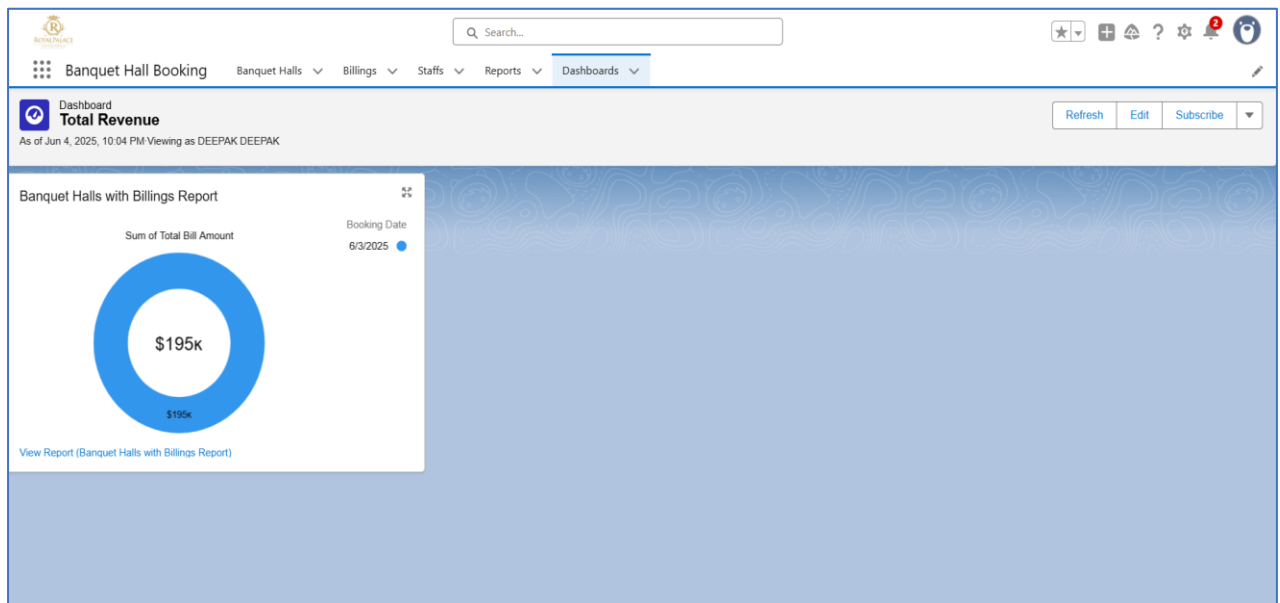
Detail Rows

Subtotals

Grand Total

# A CRM APPLICATION FOR BANQUET HALL BOOKING

## Dashboards screens



# **A CRM APPLICATION FOR BANQUET HALL BOOKING**

## **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.