Track: Salesforce Developer (SmartBridge -APSCHE)

Project Name: a crm application for banquet hall booking

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## a crm application for banquet hall booking

1. INTRODUCTION

1.1 Project Overview:

 Purpose: To build a Salesforce-based CRM for managing banquet hall inquiries, bookings, and events

 Key benefits: centralised data, automation, reporting, efficiency

 **Booking Management:** View availability calendars, schedule hall bookings, and avoid double bookings.

 **Customer Database:** Store client contact info, preferences, past events, and communication history.

 **Automated Communication:** Send booking confirmations, reminders, follow-ups, and promotional emails.

 **Quotation & Invoicing:** Generate quotes, contracts, and invoices for events.

 **Event Details Management:** Capture specifics like event type, date, time, guest count, and special requests.

 **Payment Tracking:** Record deposits, track balances, and integrate with payment gateways.

 **Analytics & Reports:** View booking trends, customer sources, and revenue reports.

 **Staff Coordination:** Assign tasks, set reminders, and communicate schedules to staff.

2. IDEATION PHASE

A **CRM (Customer Relationship Management)** application for banquet hall booking is a software platform designed to streamline the **management of customer interactions, event scheduling, and venue reservations**. It caters to banquet hall operators and event managers, enabling them to handle inquiries, bookings, payments, and customer communication efficiently.

2.1 Statement:

**1. Inquiry & Lead Management**

* Capture enquiries through web forms, phone, or walk-ins.
* Centralize leads and track follow-ups.
* Display hall availability in real time with a calendar view

**2. Booking Management**

* Convert leads into confirmed bookings.
* Manage multiple seating arrangements, catering options, AV requirements.
* Cancel or refund bookings as needed.
* Use drag‑and‑drop scheduling in monthly/weekly views

**3. Catering & Services**

* Maintain menus and dishes, support bulk import via Excel.
* Generate kitchen order printouts or digital service tickets
* Handle AV equipment, rentals, and decor requirements.

**4. Billing & Payments**

* Auto-generate invoices and receipts in PDF.
* Capture partial/full payments, manage outstanding balances and cheque reconciliation.
* Integrate secure online payment gateways

**5. Client Communication & CRM**

* Automate reminders, notifications, and confirmations (email/WhatsApp/SMS).
* Notify clients/staff about event updates and upcoming dates
* Send post-event feedback forms and store customer reviews

**6. Document & Contract Management**

* Create branded proposals, master lists, contracts, and function prospectuses.
* Support e-signature signing and contract templates

**7. Reporting & Analytics**

* **Run real-time dashboards: bookings, revenue per hall, cancellation rates, outstanding payments.**
* **Produce MIS reports for finance (P&L, receipts aging, venue-wise sales)**

**8. User & Multi-Venue Security**

* **Set user roles/permissions and multi-property views.**
* **Restrict data access per branch, module, or location 9. Mobile & Cloud Support**
* **Cloud-based apps accessible on smartphones and tablets.**
* **On-the-go booking and updates.**

**10. Integrations & APIs**

* **Sync with websites via booking widgets or API.**
* **Integrate with PMS (property management systems), finance software, and marketing tools .**

**3.1User Stories & Use Cases  
Referencing user flows from the existing solution**

** Inquiry: As a Sales Rep, I want to log client inquiries (date, attendees, layout, catering requirements, AV equipment…)**

** Proposal: As a Sales Rep, I want to create and send proposals (packages, pricing, services)**

** Booking: As a Sales Rep, I want to convert inquiry to confirmed booking, trigger deposit invoice**

** Event Coordination: As an Event Manager, I want to track final details: decor, menu, setup, reminders, staff assignment**

** Day‑of Execution: As Event Staff, I want to use checklists for setup, equipment, troubleshoot**

** Post‑Event: As Management, I want to record feedback, close tasks, generate reports**

**4.1 Data Model & Salesforce Objects**

* **Custom Objects: Event Inquiry, Event Booking, Event Service (Catering/Menu), AV Request, Venue Setup Plan, Feedback**
* **Fields:**
  + **Event Inquiry: Client, Event Date/Time, Attendance, Event Type, Proposed Packages**
  + **Booking: Status (Tentative / Confirmed / Cancelled), Deposit Amount, Confirmation Date**
  + **Services: Menu Options, AV Needs, Decor, Additional Notes**

**5.1 Overview:**

**Project Description:**

**User Story:**

**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.**

**Project Flow:**

**Milestone 1 : Creation of developer account**

**Milestone 2 : Object Creation**

**Milestone 3 : Tabs**

**Milestone 4 : The Lightning App**

**Milestone 5 : Fields**

**Milestone 6 : Creation of Page Layout**

**Milestone 7 : Creation of Record Types**

**Milestone 8 : Validation rules**

**Milestone 9 : Flows**

**Milestone 10 : Triggers**

**6.1 implementation :**

**1. Define Your Requirements**

* **Identify Key Features: List the features you need, such as booking management, customer relationship management, payment processing, and reporting.**
* **Data Model: Define the data structure, including objects like Customers, Bookings, Payments, and Venues.**

**2. Choose the Right Salesforce Products**

* **Sales Cloud: For managing customer relationships and sales processes.**
* **Service Cloud: For customer support and service management.**
* **Experience Cloud: For building customer portals and communities.**
* **Marketing Cloud: For marketing automation and customer engagement.**
* **MuleSoft: For integrating with other systems and data sources.**
* **Tableau: For data visualization and analytics.**

**3. Set Up Your Salesforce Org**

* **Sign Up: Create a Salesforce account and set up your organization.**
* **Customize Objects: Create custom objects and fields to match your data model.**
* **Page Layouts: Customize page layouts to display relevant information.**

**4. Implement Business Logic**

* **Workflows and Process Builder: Automate business processes like sending confirmation emails or updating booking statuses.**
* **Apex Code: Write custom code for complex business logic that can’t be handled by standard tools.**
* **Validation Rules: Ensure data integrity by setting up validation rules.**

**5. Integrate with Other Systems**

* **MuleSoft: Use MuleSoft to integrate Salesforce with other systems like payment gateways, email services, and external databases.**
* **APIs: Utilize Salesforce APIs to connect with external applications.**

**6. Set Up User Access and Security**

* **Profiles and Roles: Define user roles and profiles to control access to data and features.**
* **Permission Sets: Grant additional permissions to specific users as needed.**

**7. Test Your Implementation**

* **Sandbox Environment: Use a sandbox environment to test your implementation without affecting live data.**
* **User Acceptance Testing (UAT): Conduct UAT to ensure the system meets user requirements.**

**8. Deploy to Production**

* **Change Sets: Use change sets to deploy customizations from sandbox to production.**
* **Monitoring and Maintenance: Continuously monitor the system and make improvements as needed.**

**9. Training and Support**

* **User Training: Provide training sessions for users to familiarize them with the new system.**
* **Documentation: Create documentation for reference and troubleshooting.**

**Resources**

* **Salesforce Trailhead: Utilize Salesforce Trailhead for guided learning and tutorials.**
* **Salesforce Documentation: Refer to Salesforce’s official documentation for detailed instructions.**

**7.1 RESULTS:**