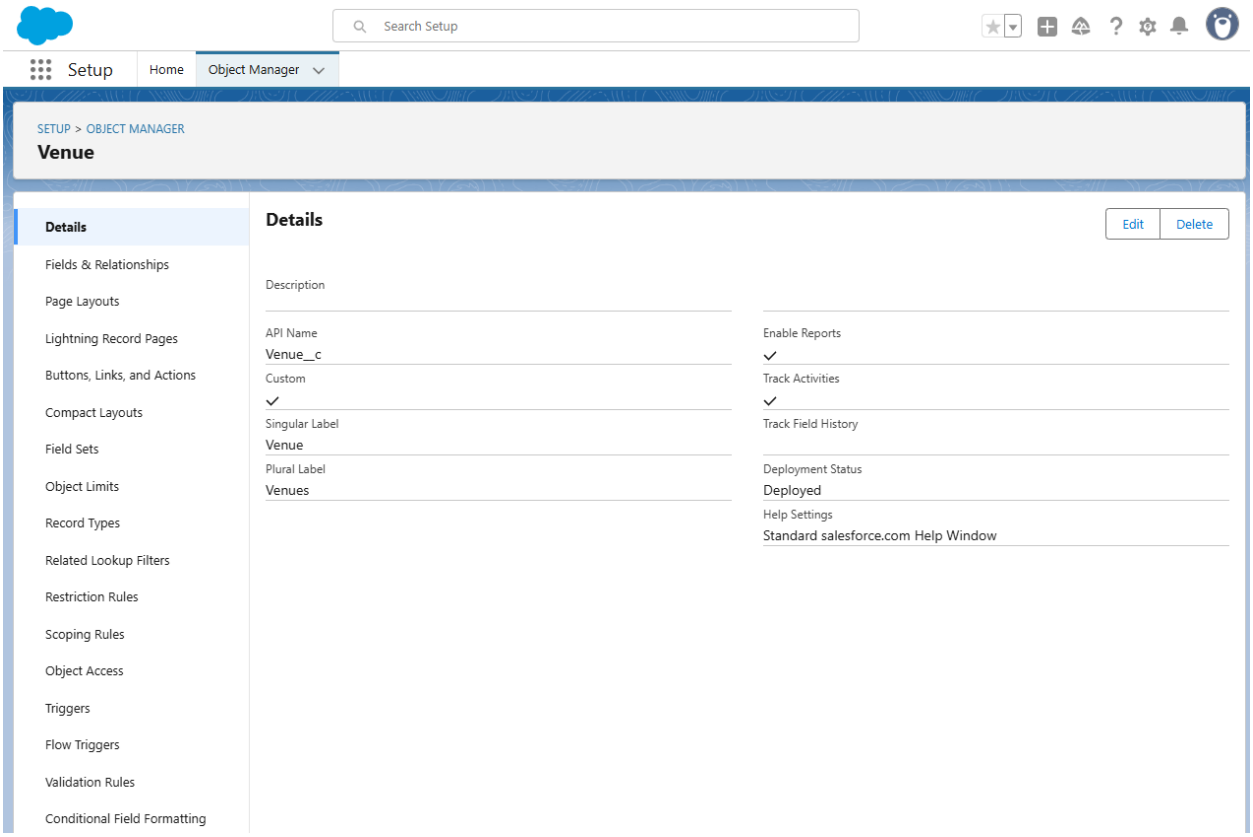
Project Title: Event Venue CRM

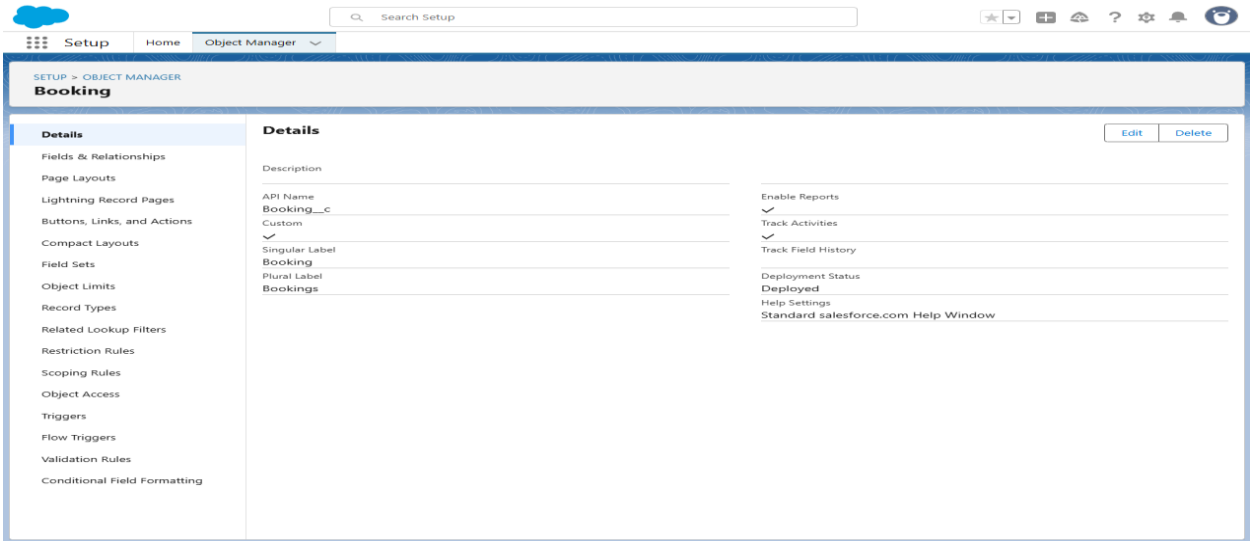
Phase 3 — Data Modeling & Relationships

3.1 Use standard objects vs custom

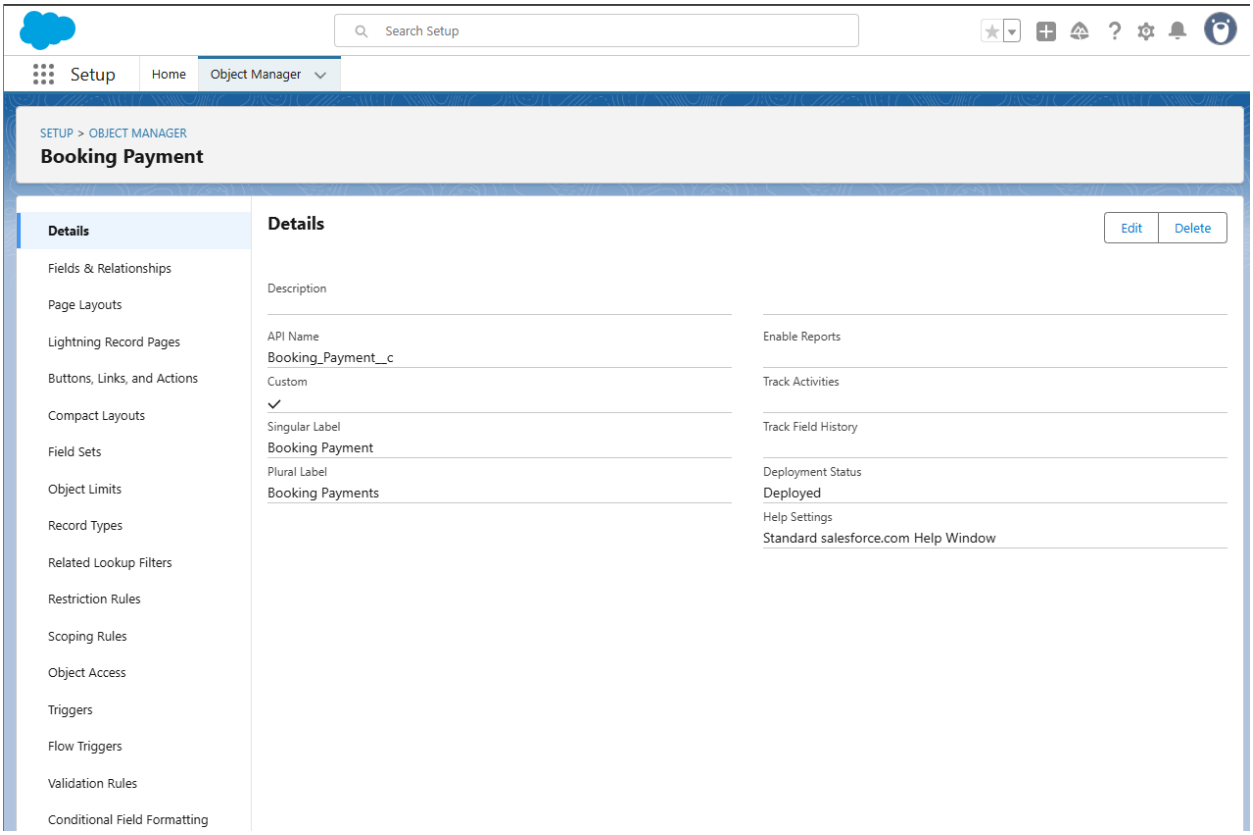
- Contact → Use for Customer (recommended, instead of custom Customer object).
- Account → (optional) Use for Corporate Customers / Companies if needed.
- Create custom objects:
    - Venue__c (label: Venue)



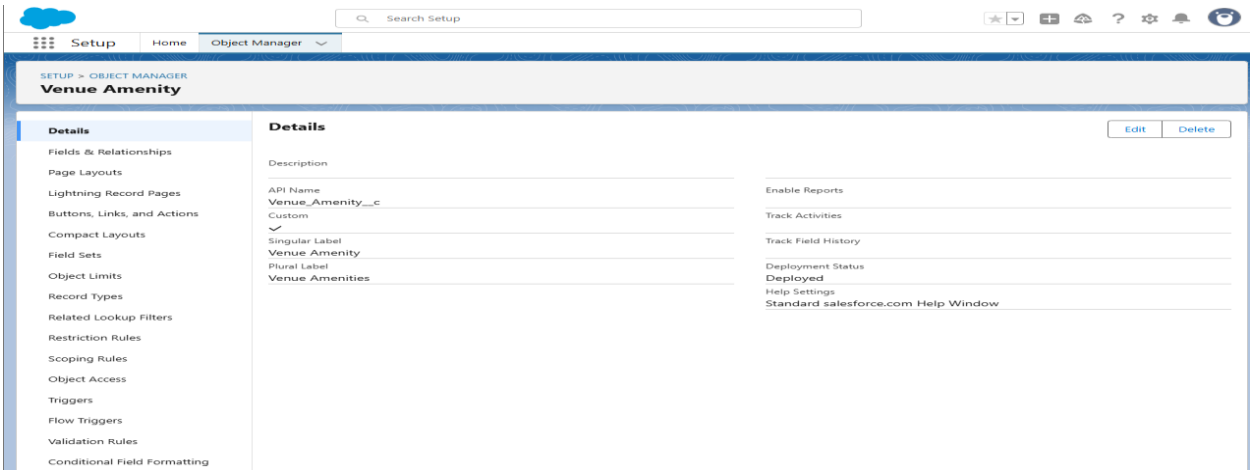
- Booking__c (label: Booking)



- Booking_Payment__c (optional, to track payments)



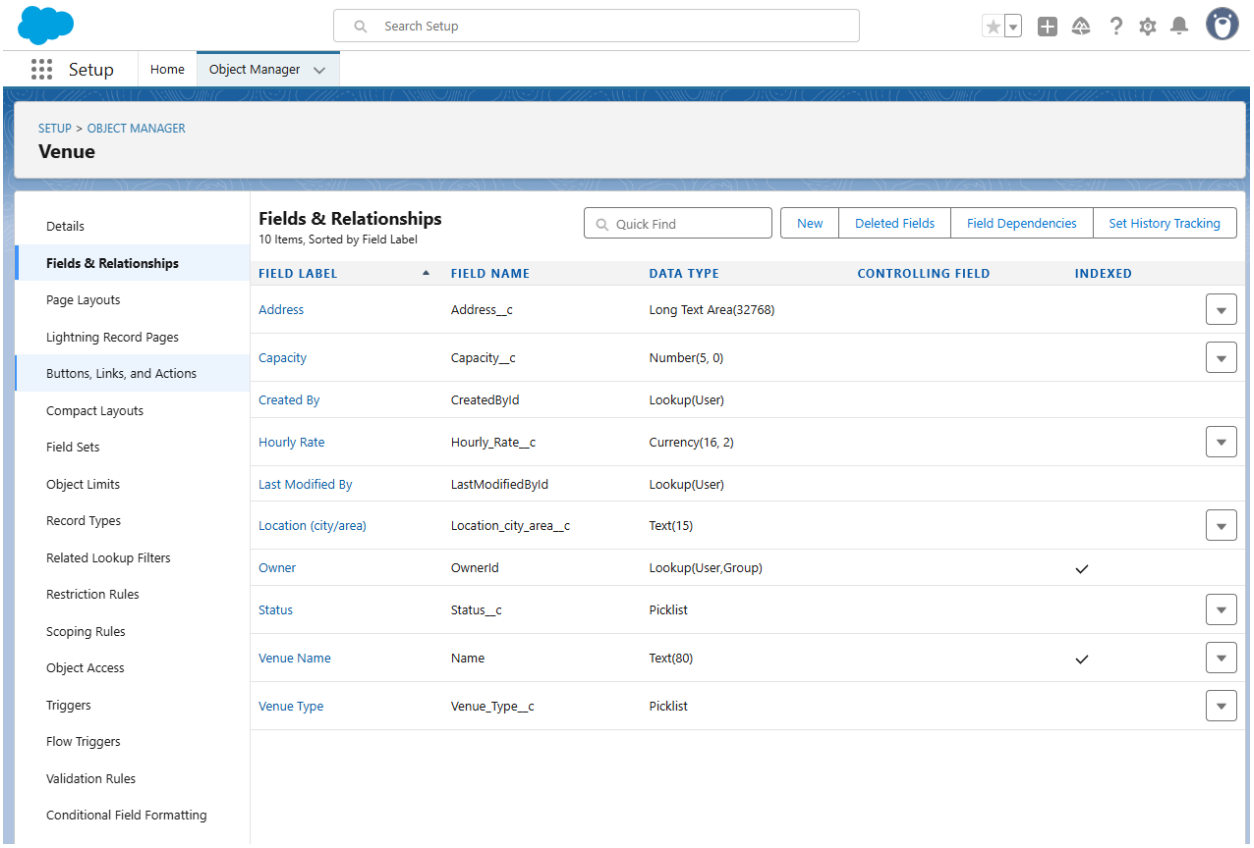
- Venue_Amenity__c (optional, to track extra features like Projector, Catering)



3.2 Create custom objects and fields (exact clicks)

A. Create Venue__c

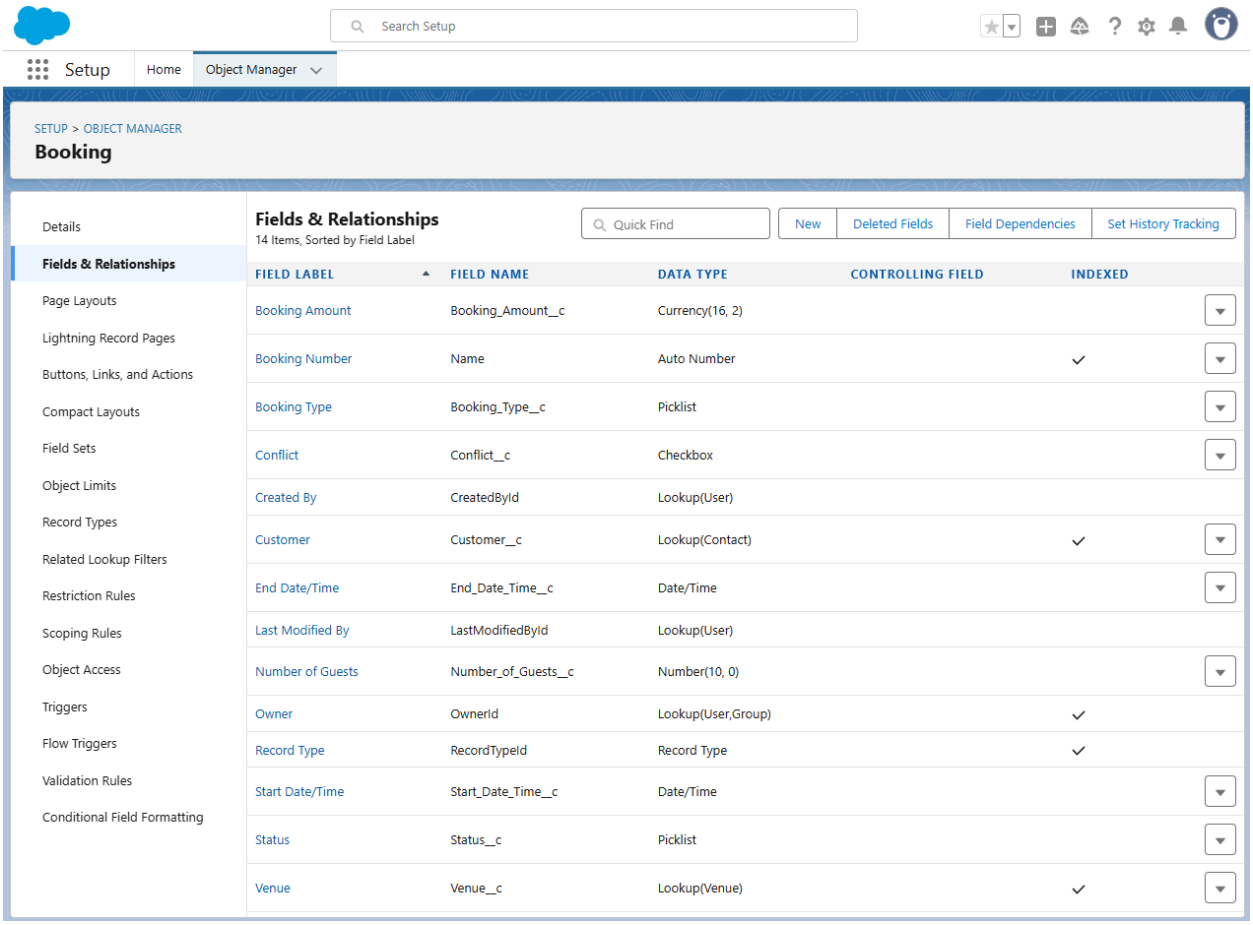
1. Setup → Object Manager → Create → Custom Object.
    - Label: Venue → Plural: Venues → Object Name: Venue__c.



2. **Fields & Relationships → New:**
    - Address__c — Text Area (Address).
    - Capacity__c — Number (0 decimals).
    - Hourly_Rate__c — Currency (INR).
    - Venue_Type__c — Picklist: Hall, Lawn, Rooftop, Banquet.
    - Status__c — Picklist: Available, Blocked, Maintenance.

B. Create Booking__c

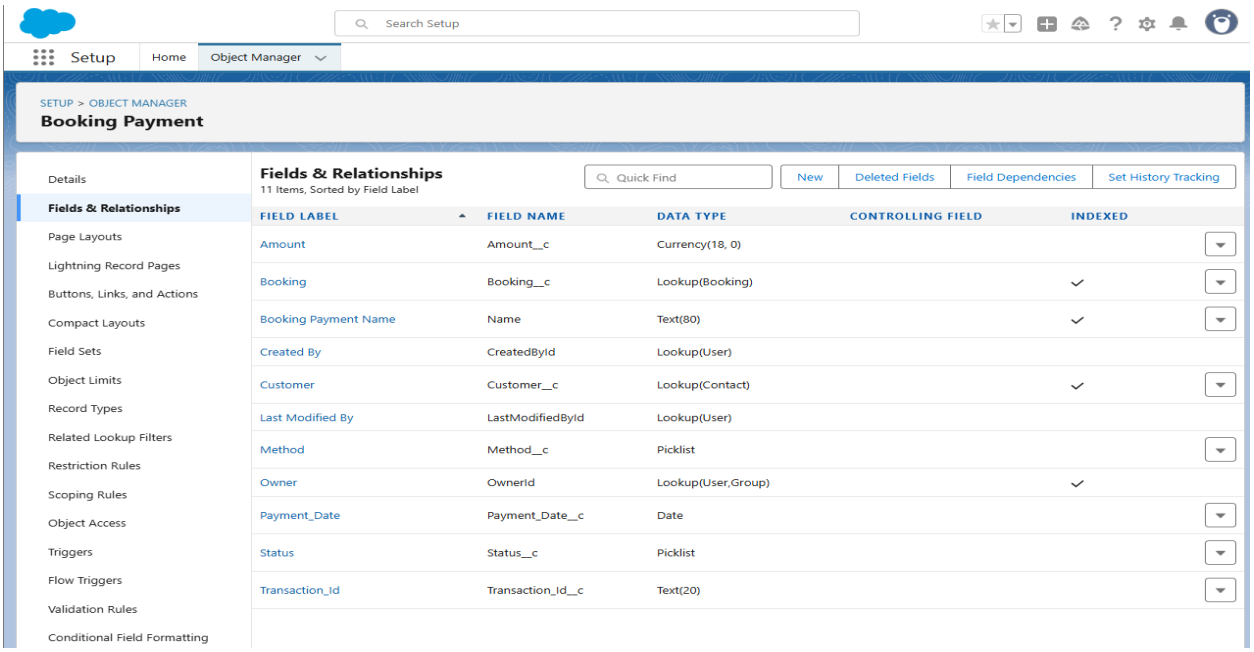
1. **Object Manager → Create → Custom Object.**
    - Label: Booking → Plural: Bookings → Object Name: Booking__c.
    - Record Name: Auto Number → Format: BK-{0000}.



2. **Fields & Relationships → New:**
    - Start_DateTime__c — Date/Time.
    - End_DateTime__c — Date/Time.
    - Venue__c — Lookup(Venue).
    - Customer__c — Lookup(Contact).
    - Booking_Amount__c — Currency.
    - Number_of_Guests__c — Number.
    - Status__c — Picklist: Requested, Confirmed, Approved, Rejected, Cancelled, Completed, Conflict.
    - Conflict__c — Checkbox (default unchecked).
    - Payment_Status__c — Picklist: Pending, Partially Paid, Paid.

C. Create Booking_Payment__c

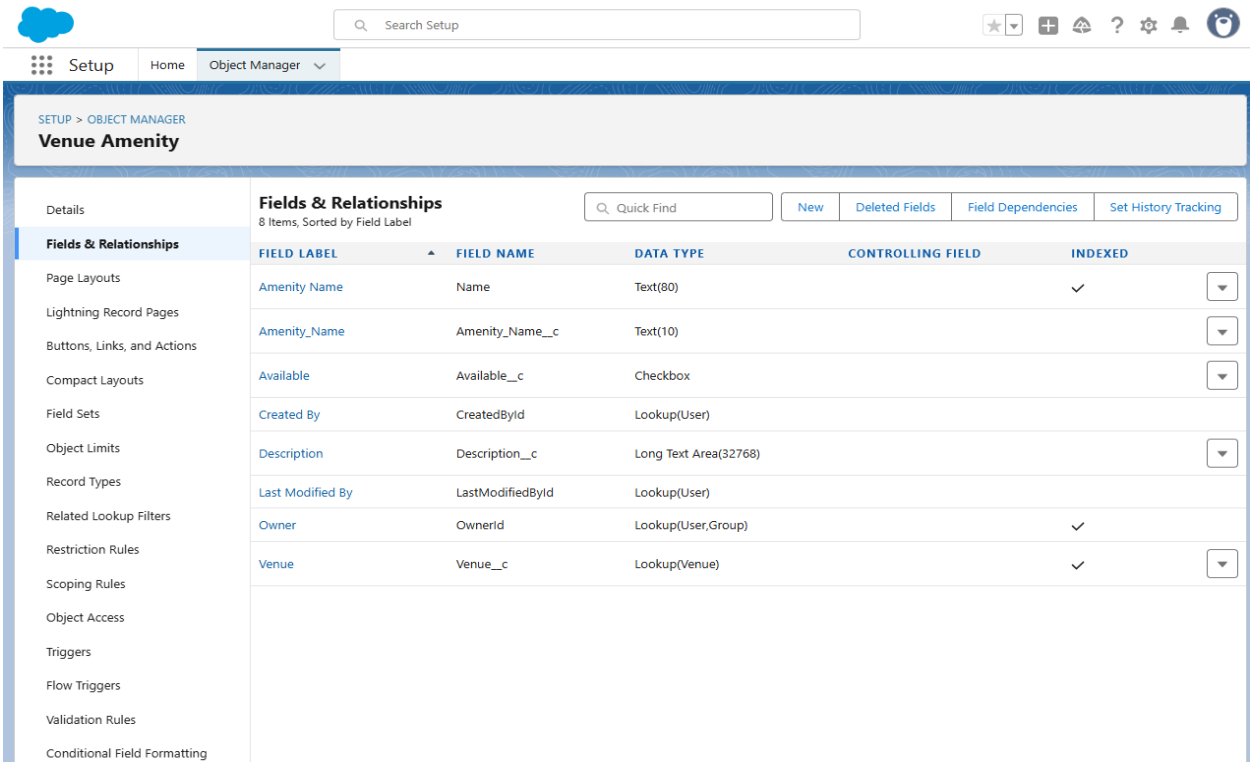
1. **Object Manager → Create → Custom Object.**
    - Label: Booking Payment → Plural: Booking Payments → API: Booking_Payment__c.
    - Record Name: Payment Number (Auto Number, e.g., PAY-{0000}).



2. **Fields & Relationships → New:**
    - Booking__c — Lookup(Booking).
    - Amount__c — Currency.
    - Payment_Date__c — Date.
    - Payment_Method__c — Picklist: Cash, Card, UPI, Bank Transfer.
    - Status__c — Picklist: Pending, Completed, Failed.

D. Create Venue_Amenity__c (optional)

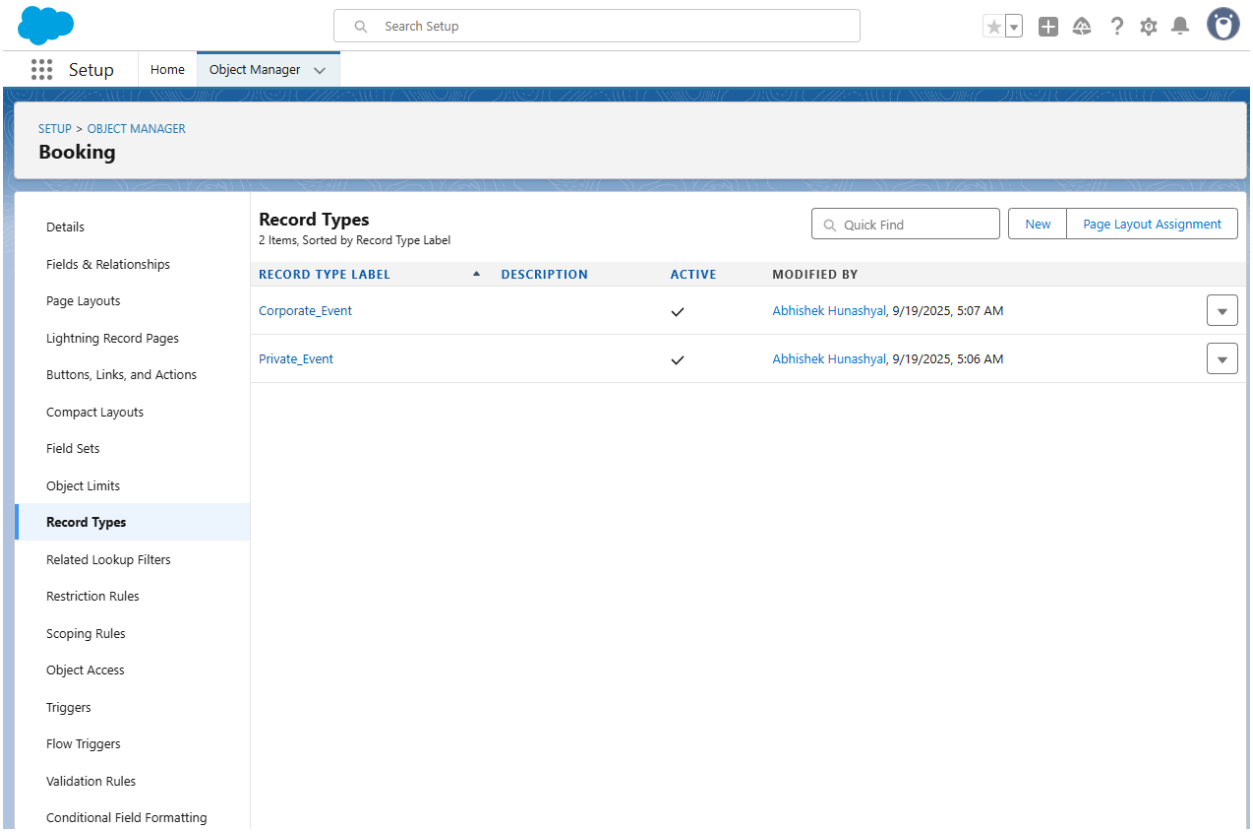
1. Object Manager → Create → Custom Object.
    - Label: Venue Amenity → Plural: Venue Amenities.
2. **Fields:**
    - Venue__c — Lookup(Venue).
    - Amenity_Name__c — Text (e.g., Projector, Sound System).
    - Cost__c — Currency.
    - Available__c — Checkbox (default TRUE).



3.3 Record Types & Page Layouts

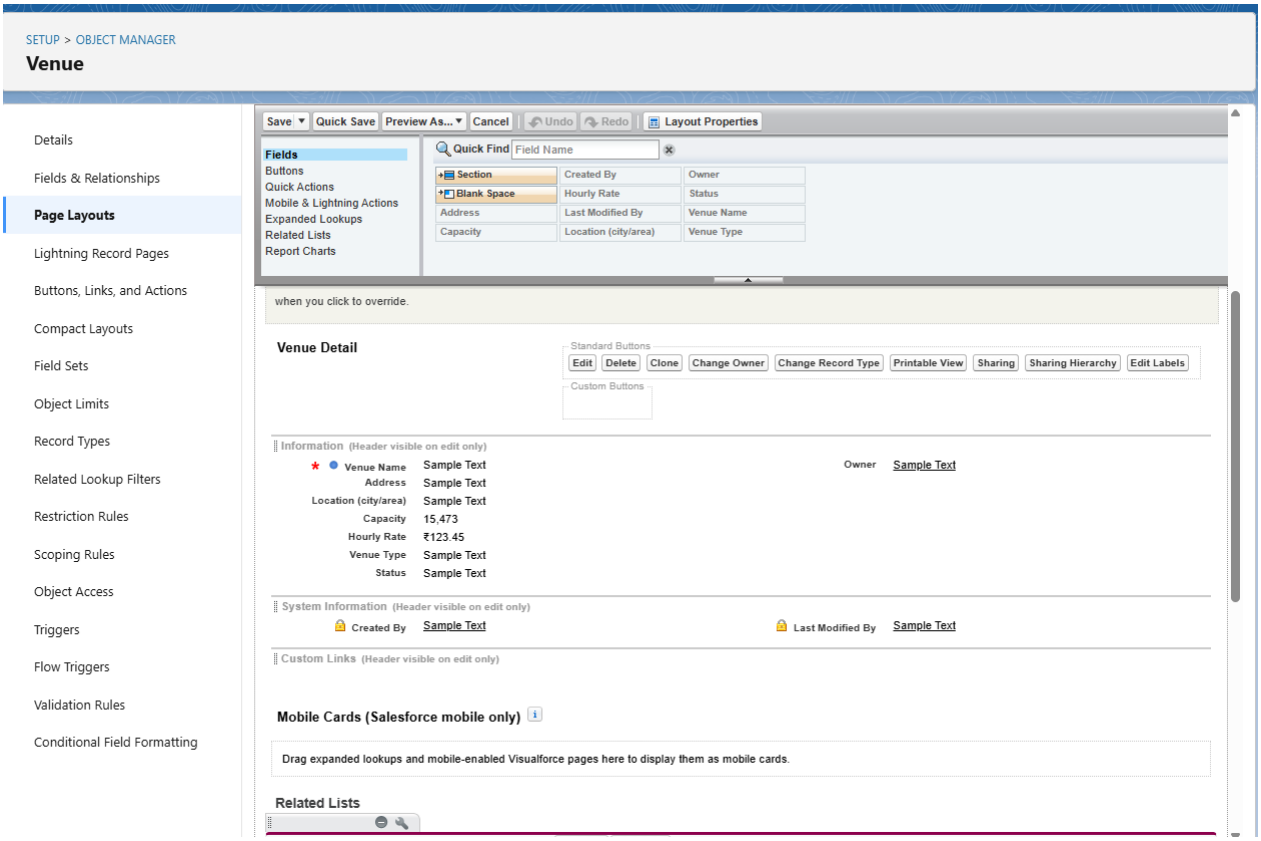
A. Booking Record Types

1. Setup → Object Manager → Booking → Record Types → New.
    - Create: Private_Event, Corporate_Event.
    - Assign to profiles.
    - For picklists: Private_Event allows Booking_Type = Private; Corporate_Event allows Booking_Type = Corporate.
2. Page Layouts → arrange fields:
    - Private_Event layout → show Guest Count, Promo Code fields.
    - Corporate_Event layout → show Invoice, Company Info, Payment Status fields.
3. Assign page layouts using Page Layout Assignment.



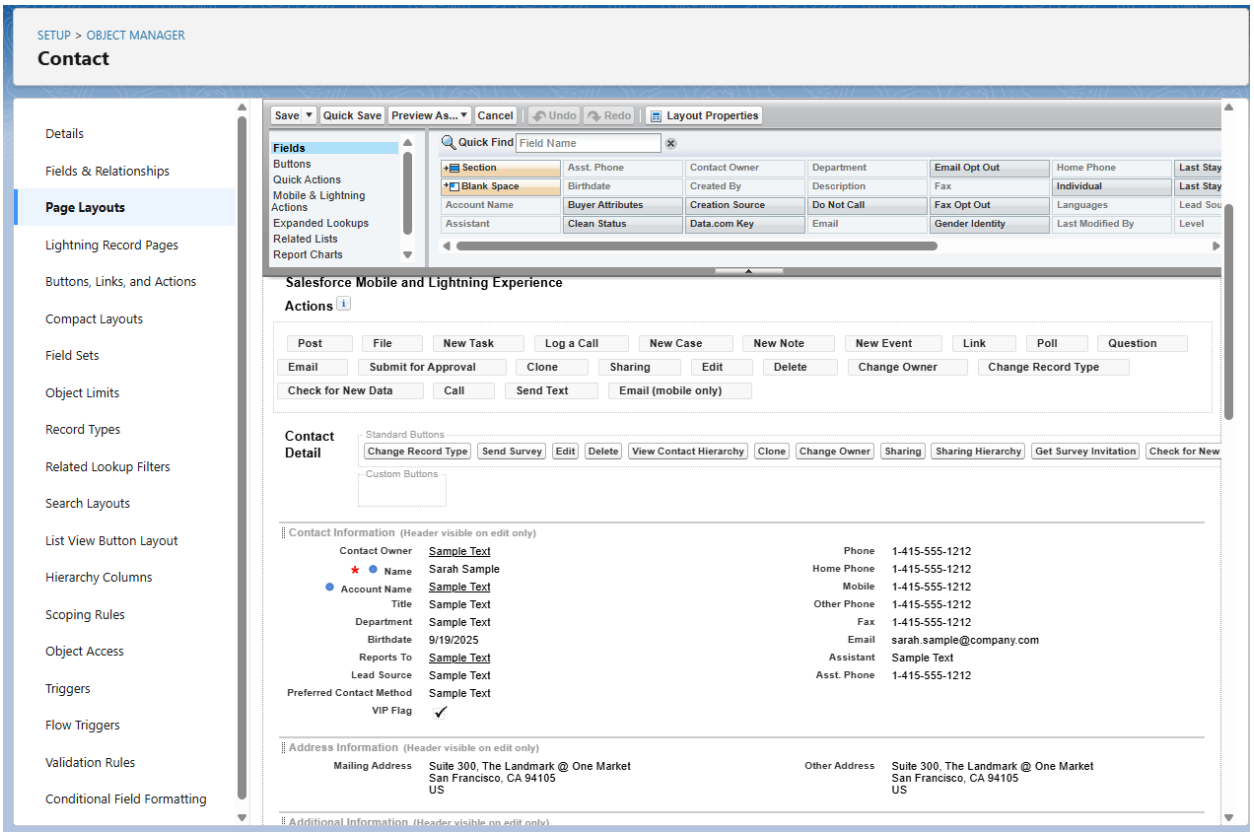
B. Venue Page Layout

1. Object Manager → Venue → Page Layouts → open default.
2. Place key fields at top: Venue Name, Address, Capacity, Hourly Rate, Venue Type, Status.
3. Related Lists: Add Bookings, Venue Amenities.



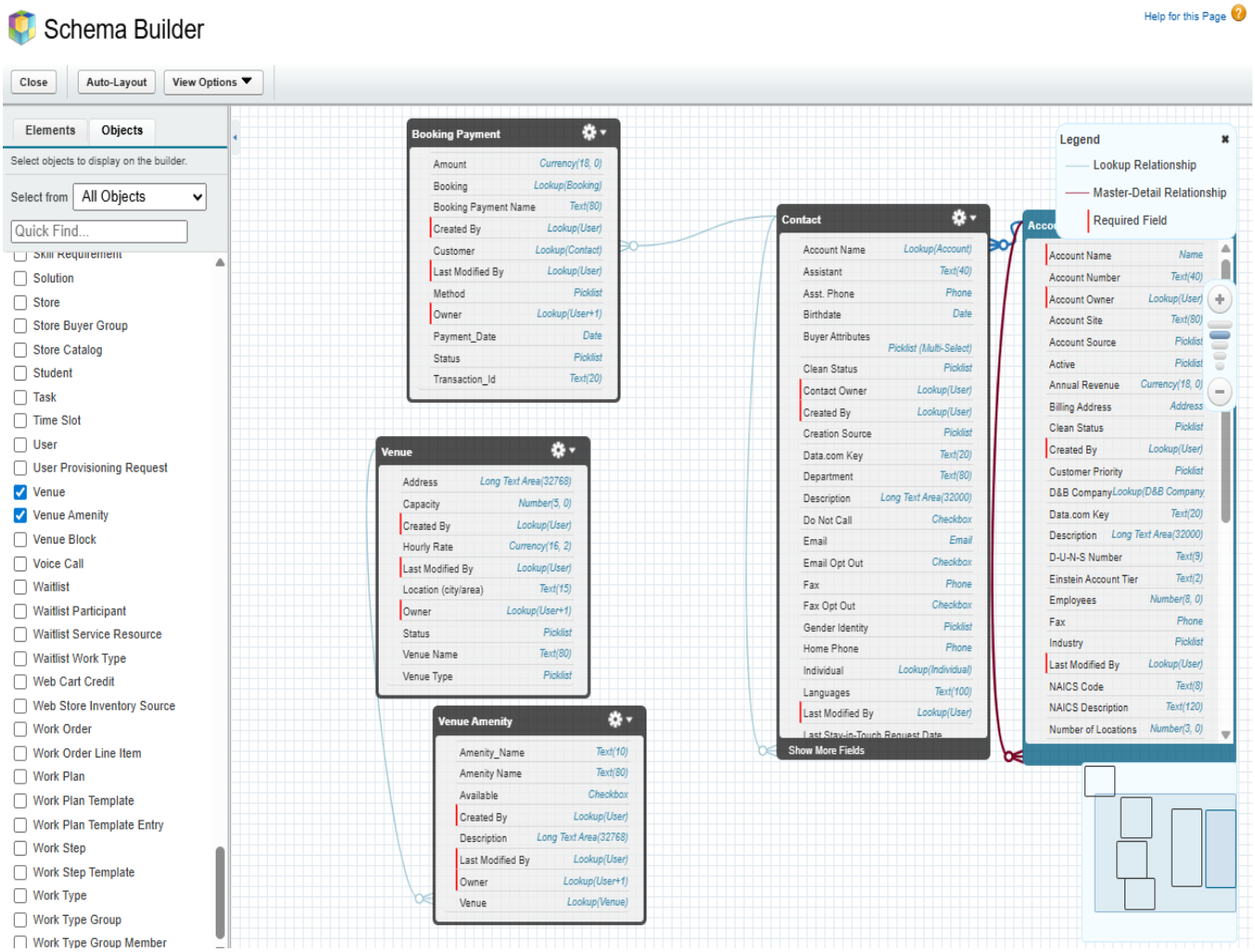
C. Contact Page Layout

1. Object Manager → Contact → Page Layouts → open customer layout.
2. Add Related Lists: Bookings, Booking Payments.
3. Optional custom fields:
    - Preferred_Contact_Method__c (Picklist: Email, Phone, WhatsApp).
    - VIP_Flag__c (Checkbox).



3.4 Schema Builder

1. Setup → Quick Find → Schema Builder.
2. Drag objects: Venue, Booking, Contact, Booking Payment, Venue Amenity.
3. Confirm relationships:
    - Booking → Lookup to Venue & Contact.
    - Booking Payment → Lookup to Booking.
    - Venue Amenity → Lookup to Venue.



3.5 Create sample data to test (validate model)

1. App Launcher → Venues → New → create Royal Hall.
    - Address: Delhi, Capacity: 200, Hourly Rate: 5000, Status: Available.
2. App Launcher → Contacts → New → create Ravi Sharma.
    - Email: ravi@test.com, Phone: 9999999999.
3. App Launcher → Bookings → New → link Venue = Royal Hall, Customer = Ravi Sharma.
    - Start Date/Time: tomorrow 6 PM, End Date/Time: tomorrow 10 PM, Booking Amount = 20,000, Status = Requested.
4. App Launcher → Booking Payments → New → Booking = BK-0001, Amount = 10,000, Payment Method = UPI, Status = Completed.
5. Open Ravi Sharma (Contact) → scroll down → see related Bookings + Payments.
6. Open Royal Hall (Venue) → scroll down → see related Bookings + Amenities.