

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)

The screenshot shows the Salesforce Setup interface for a custom object named 'Venue'. The top navigation bar includes the Salesforce logo, a search bar labeled 'Search Setup', and several utility icons. Below the navigation bar, the 'Setup' menu is open, showing 'Home' and 'Object Manager'. The 'Object Manager' section is selected, and the 'Venue' object is highlighted. The main content area displays the 'Details' tab for the 'Venue' object. On the left, a sidebar lists various configuration options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, Scoping Rules, Object Access, Triggers, Flow Triggers, Validation Rules, and Conditional Field Formatting. The 'Details' tab is active, showing a table of configuration settings. The table has two columns: 'API Name' and 'Value'. The 'API Name' column lists 'Venue__c', 'Custom', 'Singular Label', 'Plural Label', and 'Venues'. The 'Value' column shows 'Venue__c', 'Custom', a checkmark, 'Venue', and 'Venues' respectively. To the right of the table, there are two columns of settings: 'Enable Reports' (checked), 'Track Activities' (checked), 'Track Field History' (checked), 'Deployment Status' (Deployed), and 'Help Settings' (Standard salesforce.com Help Window). At the top right of the details section, there are 'Edit' and 'Delete' buttons.

API Name	Value
Venue__c	Venue__c
Custom	Custom
✓	✓
Singular Label	Venue
Plural Label	Venues

Setting	Value
Enable Reports	✓
Track Activities	✓
Track Field History	✓
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

○ Booking__c (label: Booking)

The screenshot shows the Salesforce Setup interface for the Booking__c object. The top navigation bar includes the Setup icon, Home, and Object Manager. A search bar is present. The left sidebar lists various configuration options under the 'Details' section. The main content area displays the details for Booking__c, including API Name, Custom status, Singular Label, Plural Label, and various tracking and deployment settings.

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Object Access
Triggers
Flow Triggers
Validation Rules
Conditional Field Formatting

Details
Description
API Name Booking__c
Custom ✓
Singular Label Booking
Plural Label Bookings
Enable Reports ✓
Track Activities ✓
Track Field History
Deployment Status Deployed
Help Settings Standard salesforce.com Help Window

○ Booking_Payment__c (optional, to track payments)

The screenshot shows the Salesforce Setup interface for the Booking_Payment__c object. The top navigation bar includes the Setup icon, Home, and Object Manager. A search bar is present. The left sidebar lists various configuration options under the 'Details' section. The main content area displays the details for Booking_Payment__c, including API Name, Custom status, Singular Label, Plural Label, and various tracking and deployment settings.

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Object Access
Triggers
Flow Triggers
Validation Rules
Conditional Field Formatting

Details
Description
API Name Booking_Payment__c
Custom ✓
Singular Label Booking Payment
Plural Label Booking Payments
Enable Reports
Track Activities
Track Field History
Deployment Status Deployed
Help Settings Standard salesforce.com Help Window

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

The screenshot shows the Salesforce Setup interface for the 'Venue Amenity' object. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, etc. The main content area is titled 'Details' and includes fields for Description, API Name (Venue_Amenity__c), Custom, Singular Label (Venue Amenity), Plural Label (Venue Amenities), and various tracking options like Enable Reports, Track Activities, and Track Field History.

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.

The screenshot shows the Salesforce Setup interface for the 'Venue' object, specifically the 'Fields & Relationships' section. The left sidebar contains a navigation menu. The main content area displays a table of fields with columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The table lists 10 items, including Address, Capacity, Created By, Hourly Rate, Last Modified By, Location (city/area), Owner, Status, Venue Name, and Venue Type.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address__c	Long Text Area(32768)		
Capacity	Capacity__c	Number(5, 0)		
Created By	CreatedById	Lookup(User)		
Hourly Rate	Hourly_Rate__c	Currency(16, 2)		
Last Modified By	LastModifiedById	Lookup(User)		
Location (city/area)	Location_city_area__c	Text(15)		
Owner	OwnerId	Lookup(User,Group)		✓
Status	Status__c	Picklist		
Venue Name	Name	Text(80)		✓
Venue Type	Venue_Type__c	Picklist		


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}.



Setup

Home

Object Manager

SETUP > OBJECT MANAGER

Booking

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Object Access

Triggers

Flow Triggers

Validation Rules

Conditional Field Formatting

Fields & Relationships
14 Items, Sorted by Field Label

[New](#)

[Deleted Fields](#)

[Field Dependencies](#)

[Set History Tracking](#)

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Booking Amount	Booking_Amount__c	Currency(16, 2)		
Booking Number	Name	Auto Number		✓
Booking Type	Booking_Type__c	Picklist		
Conflict	Conflict__c	Checkbox		
Created By	CreatedById	Lookup(User)		
Customer	Customer__c	Lookup(Contact)		✓
End Date/Time	End_Date_Time__c	Date/Time		
Last Modified By	LastModifiedById	Lookup(User)		
Number of Guests	Number_of_Guests__c	Number(10, 0)		
Owner	OwnerId	Lookup(User,Group)		✓
Record Type	RecordTypeId	Record Type		✓
Start Date/Time	Start_Date_Time__c	Date/Time		
Status	Status__c	Picklist		
Venue	Venue__c	Lookup(Venue)		✓

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}).

The screenshot shows the Salesforce Setup interface for the 'Booking Payment' object. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, Scoping Rules, Object Access, Triggers, Flow Triggers, Validation Rules, and Conditional Field Formatting. The main content area is titled 'Booking Payment' and shows the 'Fields & Relationships' section. It lists 11 items, sorted by Field Label. The table below shows the details of these fields.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Currency(18, 0)		
Booking	Booking__c	Lookup(Booking)		✓
Booking Payment Name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Customer	Customer__c	Lookup(Contact)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Method	Method__c	Picklist		
Owner	OwnerId	Lookup(User,Group)		✓
Payment Date	Payment_Date__c	Date		
Status	Status__c	Picklist		
Transaction Id	Transaction_Id__c	Text(20)		

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).

The screenshot displays the Salesforce Setup interface. At the top, there is a navigation bar with a search bar labeled 'Search Setup' and several utility icons. Below the navigation bar, the 'Setup' menu is open, showing 'Object Manager' as the selected option. The main content area is titled 'Venue Amenity' and shows the 'Fields & Relationships' tab. A sidebar on the left lists various setup categories, with 'Fields & Relationships' currently selected. The 'Fields & Relationships' section shows a table of 8 items, sorted by Field Label. The table columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The items listed are: Amenity Name (Name, Text(80), indexed), Amenity_Name (Amenity_Name__c, Text(10), indexed), Available (Available__c, Checkbox, indexed), Created By (CreatedById, Lookup(User), not indexed), Description (Description__c, Long Text Area(32768), indexed), Last Modified By (LastModifiedById, Lookup(User), not indexed), Owner (OwnerId, Lookup(User,Group), indexed), and Venue (Venue__c, Lookup(Venue), indexed).

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amenity Name	Name	Text(80)		✓
Amenity_Name	Amenity_Name__c	Text(10)		✓
Available	Available__c	Checkbox		✓
Created By	CreatedById	Lookup(User)		
Description	Description__c	Long Text Area(32768)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Venue	Venue__c	Lookup(Venue)		✓

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.

The screenshot displays the Salesforce Setup interface. At the top, there is a navigation bar with the Salesforce logo, a search bar labeled "Search Setup", and several utility icons. Below the navigation bar, the "Setup" menu is open, showing options like Home, Object Manager, and Record Types. The "Object Manager" option is selected, leading to the "Booking" record type configuration page. The page has a breadcrumb trail "SETUP > OBJECT MANAGER" and a title "Booking". On the left, a sidebar lists various configuration options, with "Record Types" highlighted. The main content area shows the "Record Types" section for the "Booking" object. It includes a "Quick Find" search bar, a "New" button, and a "Page Layout Assignment" link. Below this, a table lists the existing record types:

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
Corporate_Event		✓	Abhishek Hunashyal, 9/19/2025, 5:07 AM
Private_Event		✓	Abhishek Hunashyal, 9/19/2025, 5:06 AM

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.

SETUP > OBJECT MANAGER

Venue

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Object Access

Triggers

Flow Triggers

Validation Rules

Conditional Field Formatting

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

Fields

Quick Find Field Name

Section

Blank Space

Created By

Hourly Rate

Last Modified By

Location (city/area)

Owner

Status

Venue Name

Venue Type

when you click to override.

Venue Detail

Standard Buttons

Edit Delete Clone Change Owner Change Record Type Printable View Sharing Sharing Hierarchy Edit Labels

Custom Buttons

Information (Header visible on edit only)

Venue Name

Address

Location (city/area)

Capacity

Hourly Rate

Venue Type

Status

Sample Text

Sample Text

Sample Text

15,473

₹123.45

Sample Text

Sample Text

Owner

Sample Text

System Information (Header visible on edit only)

Created By

Last Modified By

Sample Text

Sample Text

Custom Links (Header visible on edit only)

Mobile Cards (Salesforce mobile only)

Drag expanded lookups and mobile-enabled Visualforce pages here to display them as mobile cards.

Related Lists

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).

The screenshot displays the Salesforce Object Manager interface for the 'Contact' object. The left sidebar shows the navigation menu with 'Page Layouts' selected. The main area shows the 'Salesforce Mobile and Lightning Experience' page layout configuration. The 'Fields' section on the left lists various fields, including 'Section', 'Blank Space', 'Account Name', 'Birthdate', 'Assistant', 'Clean Status', 'Contact Owner', 'Created By', 'Department', 'Description', 'Do Not Call', 'Email', 'Email Opt Out', 'Fax', 'Fax Opt Out', 'Gender Identity', 'Home Phone', 'Individual', 'Languages', 'Last Modified By', 'Last Stay', 'Lead Source', and 'Level'. The 'Actions' section includes buttons for 'Post', 'File', 'New Task', 'Log a Call', 'New Case', 'New Note', 'New Event', 'Link', 'Poll', 'Question', 'Email', 'Submit for Approval', 'Clone', 'Sharing', 'Edit', 'Delete', 'Change Owner', 'Change Record Type', 'Check for New Data', 'Call', 'Send Text', and 'Email (mobile only)'. The 'Contact Detail' section shows a list of fields and their values, including 'Contact Owner', 'Name', 'Account Name', 'Title', 'Department', 'Birthdate', 'Reports To', 'Lead Source', 'Preferred Contact Method', 'VIP Flag', 'Phone', 'Home Phone', 'Mobile', 'Other Phone', 'Fax', 'Email', 'Assistant', 'Asst. Phone', 'Mailing Address', and 'Other Address'. The 'VIP Flag' is checked, and the 'Preferred Contact Method' is set to 'Email'.

SETUP > OBJECT MANAGER

Contact

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Hierarchy Columns

Scoping Rules

Object Access

Triggers

Flow Triggers

Validation Rules

Conditional Field Formatting

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

Quick Find Field Name

Fields

- Section
- Blank Space
- Account Name
- Birthdate
- Assistant
- Clean Status
- Contact Owner
- Created By
- Department
- Description
- Do Not Call
- Email
- Email Opt Out
- Fax
- Fax Opt Out
- Gender Identity
- Home Phone
- Individual
- Languages
- Last Modified By
- Last Stay
- Lead Source
- Level

Salesforce Mobile and Lightning Experience

Actions

Post File New Task Log a Call New Case New Note New Event Link Poll Question

Email Submit for Approval Clone Sharing Edit Delete Change Owner Change Record Type

Check for New Data Call Send Text Email (mobile only)

Contact Detail

Standard Buttons

Change Record Type Send Survey Edit Delete View Contact Hierarchy Clone Change Owner Sharing Sharing Hierarchy Get Survey Invitation Check for New

Custom Buttons

|| Contact Information (Header visible on edit only)

Contact Owner	Sample Text	Phone	1-415-555-1212
Name	Sarah Sample	Home Phone	1-415-555-1212
Account Name	Sample Text	Mobile	1-415-555-1212
Title	Sample Text	Other Phone	1-415-555-1212
Department	Sample Text	Fax	1-415-555-1212
Birthdate	9/19/2025	Email	sarah.sample@company.com
Reports To	Sample Text	Assistant	Sample Text
Lead Source	Sample Text	Asst. Phone	1-415-555-1212
Preferred Contact Method	Sample Text		
VIP Flag	✓		


|| Address Information (Header visible on edit only)

Mailing Address	Suite 300, The Landmark @ One Market San Francisco, CA 94105 US	Other Address	Suite 300, The Landmark @ One Market San Francisco, CA 94105 US
-----------------	---	---------------	---

|| Additional Information (Header visible on edit only)

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.

 Schema Builder Help for this Page ?

Close Auto-Layout View Options ▼

Elements Objects

Select objects to display on the builder.

Select from All Objects ▼

Quick Find...

- ☐ Skill Requirement
- ☐ Solution
- ☐ Store
- ☐ Store Buyer Group
- ☐ Store Catalog
- ☐ Student
- ☐ Task
- ☐ Time Slot
- ☐ User
- ☐ User Provisioning Request
- ☒ Venue
- ☒ Venue Amenity
- ☐ Venue Block
- ☐ Voice Call
- ☐ Waitlist
- ☐ Waitlist Participant
- ☐ Waitlist Service Resource
- ☐ Waitlist Work Type
- ☐ Web Cart Credit
- ☐ Web Store Inventory Source
- ☐ Work Order
- ☐ Work Order Line Item
- ☐ Work Plan
- ☐ Work Plan Template
- ☐ Work Plan Template Entry
- ☐ Work Step
- ☐ Work Step Template
- ☐ Work Type
- ☐ Work Type Group
- ☐ Work Type Group Member

Booking Payment

Amount	Currency(18, 0)
Booking	Lookup(Booking)
Booking Payment Name	Text(80)
Created By	Lookup(User)
Customer	Lookup(Contact)
Last Modified By	Lookup(User)
Method	Picklist
Owner	Lookup(User+1)
Payment Date	Date
Status	Picklist
Transaction Id	Text(20)

Venue

Address	Long Text Area(32768)
Capacity	Number(5, 0)
Created By	Lookup(User)
Hourly Rate	Currency(16, 2)
Last Modified By	Lookup(User)
Location (city/area)	Text(15)
Owner	Lookup(User+1)
Status	Picklist
Venue Name	Text(80)
Venue Type	Picklist

Venue Amenity

Amenity Name	Text(10)
Amenity Name	Text(80)
Available	Checkbox
Created By	Lookup(User)
Description	Long Text Area(32768)
Last Modified By	Lookup(User)
Owner	Lookup(User+1)
Venue	Lookup(Venue)

Contact

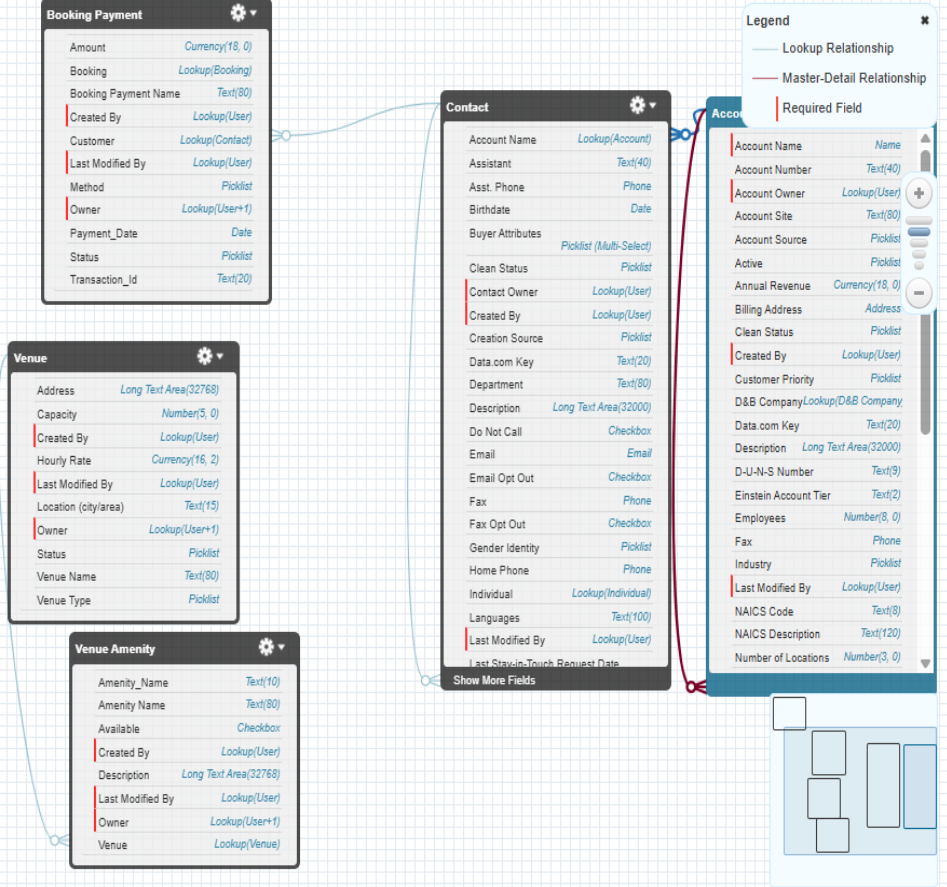
Account Name	Lookup(Account)
Assistant	Text(40)
Asst. Phone	Phone
Birthdate	Date
Buyer Attributes	Picklist (Multi-Select)
Clean Status	Picklist
Contact Owner	Lookup(User)
Created By	Lookup(User)
Creation Source	Picklist
Data.com Key	Text(20)
Department	Text(80)
Description	Long Text Area(32000)
Do Not Call	Checkbox
Email	Email
Email Opt Out	Checkbox
Fax	Phone
Fax Opt Out	Checkbox
Gender Identity	Picklist
Home Phone	Phone
Individual	Lookup(Individual)
Languages	Text(100)
Last Modified By	Lookup(User)
Last Service Touch Request Date	
Show More Fields	

Account

Account Name	Name
Account Number	Text(40)
Account Owner	Lookup(User)
Account Site	Text(80)
Account Source	Picklist
Active	Picklist
Annual Revenue	Currency(18, 0)
Billing Address	Address
Clean Status	Picklist
Created By	Lookup(User)
Customer Priority	Picklist
D&B Company	Lookup(D&B Company)
Data.com Key	Text(20)
Description	Long Text Area(32000)
D-U-N-S Number	Text(9)
Einstein Account Tier	Text(2)
Employees	Number(8, 0)
Fax	Phone
Industry	Picklist
Last Modified By	Lookup(User)
NAICS Code	Text(9)
NAICS Description	Text(120)
Number of Locations	Number(3, 0)

Legend

- Lookup Relationship
- Master-Detail Relationship
- Required Field



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.