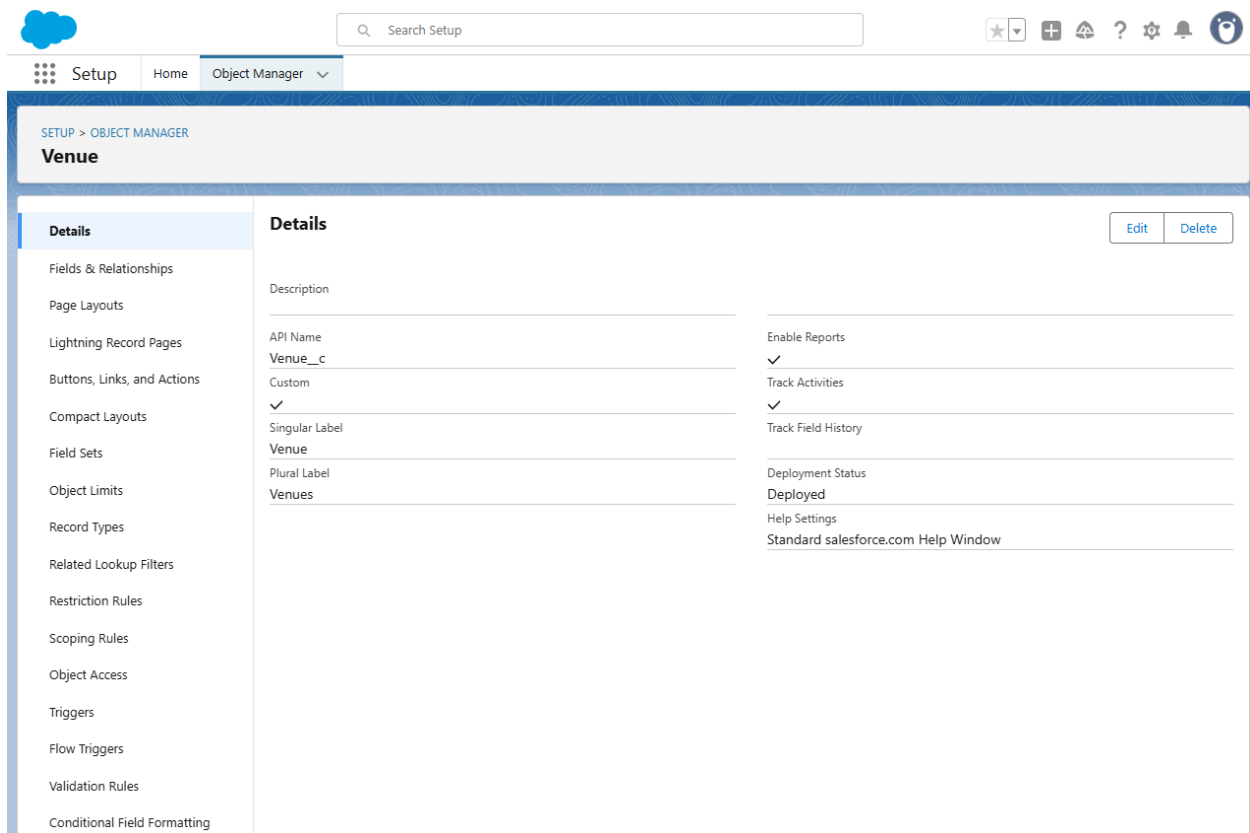


Project Title: Venue Connect CRM

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 displays the Salesforce Setup interface. At the top, there is a search bar labeled "Search Setup" and a navigation bar with tabs for Setup, Home, and Object Manager. The Object Manager tab is selected, and the breadcrumb trail shows "SETUP > OBJECT MANAGER". The main heading is "Venue".

On the left, a sidebar lists various configuration options under the "Details" section:

- 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

The main content area is titled "Details" and contains the following information:

- Description: (Empty text field)
- API Name: Venue__c
- Custom: (Checked)
- Singular Label: Venue
- Plural Label: Venues
- Enable Reports: (Checked)
- Track Activities: (Checked)
- Track Field History: (Checked)
- Deployment Status: Deployed
- Help Settings: Standard salesforce.com Help Window

At the top right of the main content area, there are "Edit" and "Delete" buttons.

- Booking__c (label: Booking)

The screenshot shows the Salesforce Setup interface for the Booking__c object. The top navigation bar includes the Setup icon, a search bar, and various utility icons. The left sidebar shows the Setup menu with 'Object Manager' selected. The main content area is titled 'Booking' and contains a 'Details' section. The 'Details' section has a left sidebar with a list of configuration options: 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 area displays the 'Details' for the Booking__c object, including fields like API Name (Booking__c), Custom (checked), Singular Label (Booking), Plural Label (Bookings), and Enable Reports (checked). The deployment status is 'Deployed'.

Setup > OBJECT MANAGER
Booking

Details [Edit](#) [Delete](#)

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, a search bar, and various utility icons. The left sidebar shows the Setup menu with 'Object Manager' selected. The main content area is titled 'Booking Payment' and contains a 'Details' section. The 'Details' section has a left sidebar with a list of configuration options: 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 area displays the 'Details' for the Booking_Payment__c object, including fields like API Name (Booking_Payment__c), Custom (checked), Singular Label (Booking Payment), Plural Label (Booking Payments), and Enable Reports (checked). The deployment status is 'Deployed'.

Setup > OBJECT MANAGER
Booking Payment

Details [Edit](#) [Delete](#)

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. The left sidebar contains a list of 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 main content area is titled 'Venue_Amenity' and shows the 'Details' tab. It includes fields for Description, API Name (Venue_Amenity__c), Custom, Singular Label (Venue_Amenity), Plural Label (Venue Amenities), Enable Reports, Track Activities, Track Field History, Deployment Status (Deployed), Help Settings, and a link to the Standard salesforce.com Help Window. There are 'Edit' and 'Delete' buttons in the top right corner.

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. The left sidebar contains a list of 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 main content area is titled 'Venue' and shows the 'Fields & Relationships' tab. It includes a 'Quick Find' search bar and buttons for 'New', 'Deleted Fields', 'Field Dependencies', and 'Set History Tracking'. Below these is a table with 10 items, sorted by Field Label. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED.

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}.



Search Setup



SetupHomeObject 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

Quick Find

NewDeleted FieldsField DependenciesSet 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 'Fields & Relationships' tab is selected, displaying a table of 11 fields. The table columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are: Amount, Booking, Booking Payment Name, Created By, Customer, Last Modified By, Method, Owner, Payment_Date, Status, and Transaction_Id. Each field has a corresponding field name and data type, and a checkbox for indexing. The 'Booking' field is highlighted in blue.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Currency(18, 0)		<input type="checkbox"/>
Booking	Booking__c	Lookup(Booking)		<input checked="" type="checkbox"/>
Booking Payment Name	Name	Text(80)		<input checked="" type="checkbox"/>
Created By	CreatedById	Lookup(User)		<input type="checkbox"/>
Customer	Customer__c	Lookup(Contact)		<input checked="" type="checkbox"/>
Last Modified By	LastModifiedById	Lookup(User)		<input type="checkbox"/>
Method	Method__c	Picklist		<input type="checkbox"/>
Owner	OwnerId	Lookup(User,Group)		<input checked="" type="checkbox"/>
Payment_Date	Payment_Date__c	Date		<input type="checkbox"/>
Status	Status__c	Picklist		<input type="checkbox"/>
Transaction_Id	Transaction_Id__c	Text(20)		<input type="checkbox"/>

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's a navigation bar with 'Setup', 'Home', and 'Object Manager' (selected). Below this, the 'Venue Amenity' object is selected. The main area is titled 'Fields & Relationships' and shows a table of fields for the 'Venue Amenity' object. The table has columns for 'FIELD LABEL', 'FIELD NAME', 'DATA TYPE', 'CONTROLLING FIELD', and 'INDEXED'. The fields listed are: 'Amenity Name' (Text(80)), 'Amenity_Name' (Text(10)), 'Available' (Checkbox), 'Created By' (Lookup(User)), 'Description' (Long Text Area(32768)), 'Last Modified By' (Lookup(User)), 'Owner' (Lookup(User,Group)), and 'Venue' (Lookup(Venue)).

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 search bar labeled "Search Setup" and a navigation bar with tabs for Setup, Home, and Object Manager. The Object Manager tab is selected, and the left sidebar shows a list of setup categories. The "Record Types" category is highlighted. The main content area shows the "Booking" record types configuration. It includes a "Quick Find" search bar, a "New" button, and a "Page Layout Assignment" button. Below these, there is a table with columns: RECORD TYPE LABEL, DESCRIPTION, ACTIVE, and MODIFIED BY. The table lists two record types: Corporate_Event and Private_Event, both of which are active and were modified by Abhishek Hunashyal on 9/19/2025.

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

Sample Text

Address

Sample Text

Location (city/area)

Sample Text

Capacity

15,473

Hourly Rate

₹123.45

Venue Type

Sample Text

Status

Sample Text

Owner

Sample Text

System Information (Header visible on edit only)

Created By

Sample Text

Last Modified By

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 preview of the contact record with fields like 'Contact Owner', 'Name', 'Account Name', 'Title', 'Department', 'Birthdate', 'Reports To', 'Lead Source', 'Preferred Contact Method', and 'VIP Flag'. The 'Address Information' section shows 'Mailing Address' and 'Other Address' fields.

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
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|| 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.

The screenshot displays the Schema Builder interface with the following components:

- Left Panel (Elements/Objects):** A list of objects with checkboxes. 'Venue' and 'Venue Amenity' are selected. Other objects include Solution, Store, Store Buyer Group, Store Catalog, Student, Task, Time Slot, User, User Provisioning Request, 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, and Work Type Group Member.
- Center Canvas:** Four object cards are shown:
 - Booking Payment:** Fields include 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), and Transaction Id (Text(20)).
 - Venue:** Fields include 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)), and Venue Type (Picklist).
 - Venue Amenity:** Fields include 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)), and Venue (Lookup(Venue)).
 - Contact:** Fields include 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)), and Last Service Touch Request Date.
- Relationships:** Blue lines connect the 'Booking' field of Booking Payment to the 'Booking' field of Booking. A blue line connects the 'Created By' field of Venue to the 'Created By' field of Contact. A blue line connects the 'Venue' field of Venue Amenity to the 'Venue' field of Venue.
- Right Panel (Legend):** Defines relationship types: 'Lookup Relationship' (blue line) and 'Master-Detail Relationship' (red line). It also lists 'Required Fields' for each object.

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.