

### Phase 3: Data Modeling & Relationships

## PetCare CRM

### A Salesforce-Based Pet Shop Management System for Customer Engagement and Service Automation

**Goal:** Build the data structure for pets, customers, bookings, and service providers.

#### Step 1: Objects

- **Standard Object: Contact** → for customers/pet owners
- **Custom Objects:**
  - **Pet** → stores pet details
  - **Service Booking** → stores booking details
  - **Service Provider** → stores details of groomers, vets, etc.

#### Step 2: Add Fields

**Pet Fields:** Type, Breed, Age, Health Status

**Service Booking Fields:** Start Date, End Date, Service Type, Total Amount

**Service Provider Fields:** Name, Service Type, Contact Info, Availability

**How:** Object → Fields & Relationships → New → Choose type → Save



SETUP > OBJECT MANAGER  
**Service Provider**

Details

**Fields & Relationships**  
8 Items, Sorted by Field Label

Q, Quick Find   New   Deleted Fields   Field Dependencies   Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Availability Status	Availability_Status__c	Picklist		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name__c	Text(20)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone Number	Phone_Number__c	Phone		
Role	Role__c	Picklist		
Service Provider Name	Name	Text(80)		✓

Left sidebar menu: 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, Restriction Rules, Scoping Rules, Object Access.

### Step 3: Record Types

- Service Booking → “Daily Service” and “Long-Term Care”

SETUP > OBJECT MANAGER  
**Service Booking**

Details

**Record Types**  
2 Items, Sorted by Record Type Label

Q, Quick Find   New   Page Layout Assignment

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
Daily Service		✓	Mounika Savvana, 9/25/2025, 11:18 PM
Long-Term Care		✓	Mounika Savvana, 9/25/2025, 11:21 PM

Left sidebar menu: 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.

### Step 4: Page Layouts

- **Pet page:** shows pet info + related bookings
- **Service Booking page:** shows booking info + related pet + customer + service provider
- **Service Provider page:** shows provider info + related booking

Setup Home Object Manager

Search Setup

SETUP > OBJECT MANAGER

### Service Provider

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

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

**Fields**

Quick Find Field Name

Section Last Modified By Role

Blank Space Name Service Provider ...

Availability Status Owner

Created By Phone Number

Information (Header visible on edit only)

Service Provider Name Sample Text Owner Sample Text

Name Sample Text

Role Sample Text

Availability Status Sample Text

Phone Number 1-415-555-1212

System Information (Header visible on edit only)

Created By Sample Text Last Modified By Sample Text

Custom Links (Header visible on edit only)

Setup Home Object Manager

Search Setup

SETUP > OBJECT MANAGER

### Pet

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

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

**Fields**

Quick Find Field Name

Section DOB Owner Vaccination Status

Blank Space Last Modified By Pet Name

Breed Last Vaccination ... Pet Owner

Created By Name Type

Label: Vaccination Status

Name: Vaccination\_Status

Type: Picklist

This item is currently in use (click to locate)

**Mobile Cards (Salesforce mobile only)**

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

**Related Lists**

**Service Booking** New Change Owner

Service Booking Name

Sample Text

## Step 5: Compact Layouts (Mobile)

- Pet → Name, Type, Health Status
- Booking → Booking ID, Service Type, Start Date
- Service Provider → Name, Service Type

Setup Search Setup

Setup Object Manager

SETUP > OBJECT MANAGER

### Pet

number of fields that display may vary based on the device's screen, which record page is being viewed, and the permissions of the user.

**Compact Layout Edit** Save Cancel

**Enter Compact Layout Information** Required Information

Label Pet Compact Layout

Name Pet\_Compact\_Layout

**Select Compact Layout Fields**

Available Fields		Selected Fields	
Breed	Add Remove	Name	Top
Created By		Type	Up
DOB		Vaccination Status	Down
Last Modified By			Bottom
Last Vaccination Date			
Owner			
Pet Name			
Pet Owner			

Use SHIFT + click to select adjacent fields. Use CTRL + click to select an assortment of fields.

Setup Search Setup

Setup Object Manager

SETUP > OBJECT MANAGER

### Service Provider

**Compact Layout Edit** Save Cancel

**Enter Compact Layout Information** Required Information

Label Service Provider Compact

Name Service\_Provider\_Compact

**Select Compact Layout Fields**

Available Fields		Selected Fields	
Availability Status	Add Remove	Name	Top
Created By		Role	Up
Last Modified By			Down
Owner			Bottom
Phone Number			
Service Provider Name			

Use SHIFT + click to select adjacent fields. Use CTRL + click to select an assortment of fields.

## Step 6: Relationships

- Booking → Pet (Lookup)
- Booking → Contact (Lookup)
- Booking → Service Provider (Lookup)

No Master-Detail needed; bookings just reference other objects

No junction object needed since one booking = one pet + one provider

## Step 7: Schema Builder

- Use Schema Builder to draw objects and their relationships visually

