

FitTrack Pro: Phase 3- Data Modeling & Relationships

This document outlines the steps to build the custom data model for the FitTrack Pro application.

Step 1: Create the Custom Objects


A. Create the "Fitness Class" Object

- **Navigation:** Go to **Setup > Object Manager > Create > Custom Object**.
- **Instructions:**
 - Label: `Fitness Class`
 - Plural Label: `Fitness Classes`
 - Record Name: `Class Name` | Data Type: `Text`
 - Check "Allow Reports" and "Allow Activities".
 - Check "Launch New Custom Tab Wizard after saving".
 - Click **Save**. In the Tab Wizard, choose a style (like a stopwatch 🕒) and accept the defaults.


The screenshot shows the Salesforce 'New Custom Object' setup page. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager'. Below this, the page title is 'New Custom Object'. A yellow message bar states: 'Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. Tell me more! Don't show this message again'. The main section is 'Custom Object Definition Edit' with buttons for 'Save', 'Save & New', and 'Cancel'. Under 'Custom Object Information', there are fields for 'Label' (with example 'Account'), 'Plural Label' (with example 'Accounts'), and 'Object Name' (with example 'Account'). There's also a 'Description' field. A 'Starts with vowel sound' checkbox is present. A red error message 'Required Information' is visible on the right side of the form.

B. Create the "Session Package" Object


- **Navigation:** Go back to **Object Manager > Create > Custom Object**.
- **Instructions:**
 - Label: `Session Package`
 - Plural Label: `Session Packages`
 - Record Name: `Package Name` | Data Type: `Text`
 - Check "Allow Reports".
 - Check "Launch New Custom Tab Wizard after saving".

- Click **Save**. In the Tab Wizard, choose a style (like a dollar sign ) and accept the defaults.

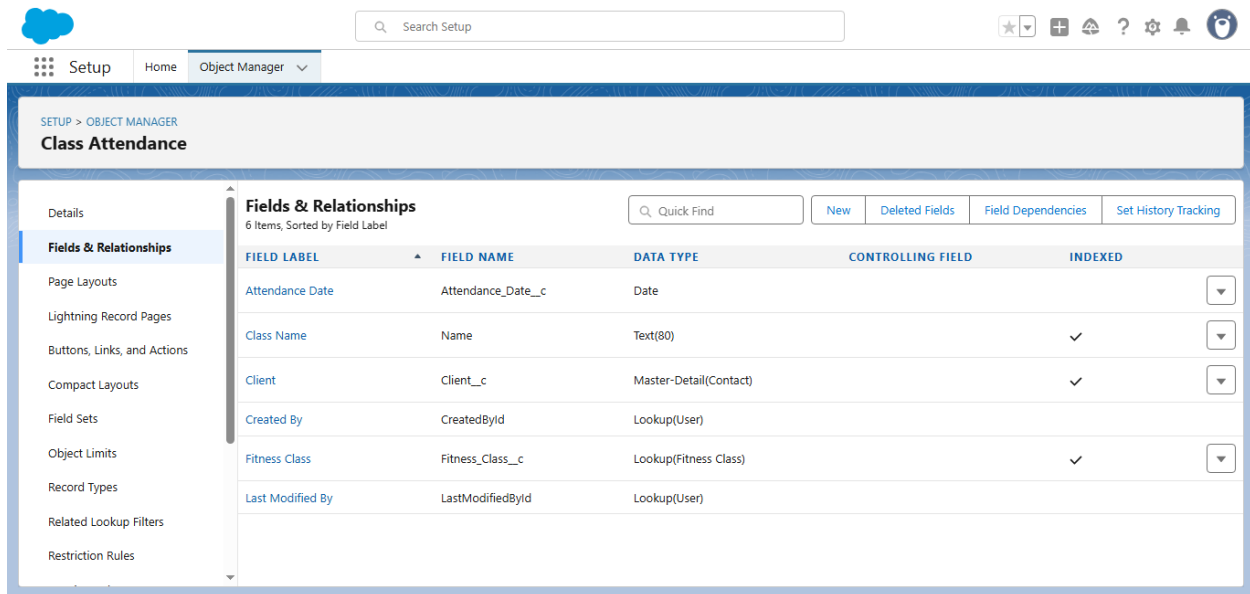
C. Create the "Client Package" Object

- **Navigation:** Go back to **Object Manager > Create > Custom Object**.
- **Instructions:**
 - Label: Client Package
 - Plural Label: Client Packages
 - Record Name: Client Package ID | Data Type: Auto-Number
 - Display Format: CP-{00000}
 - Starting Number: 1
 - Check "Allow Reports".
 - Check "Launch New Custom Tab Wizard after saving".
 - Click **Save**. In the Tab Wizard, choose a style (like a ticket ) and accept the defaults.

D. Create the "Class Attendance" Object

- **Navigation:** Go back to **Object Manager > Create > Custom Object**.
- **Instructions:**
 - Label: Class Attendance
 - Plural Label: Class Attendances
 - Record Name: Attendance ID | Data Type: Auto-Number
 - Display Format: ATT-{00000}
 - Starting Number: 1
 - Check "Allow Reports".
 - Check "Launch New Custom Tab Wizard after saving".
 - Click **Save**. In the Tab Wizard, choose a style (like a checkmark ) and accept the defaults.

Step 2: Add Custom Fields & Relationships



A. Add Fields to the **Session Package** Object

- **Navigation:** Go to **Object Manager > Session Package > Fields & Relationships > New**.
 1. **Price:** Data Type = `Currency`.
 2. **Number of Sessions:** Data Type = `Number`.

B. Add Fields to the **Fitness Class** Object

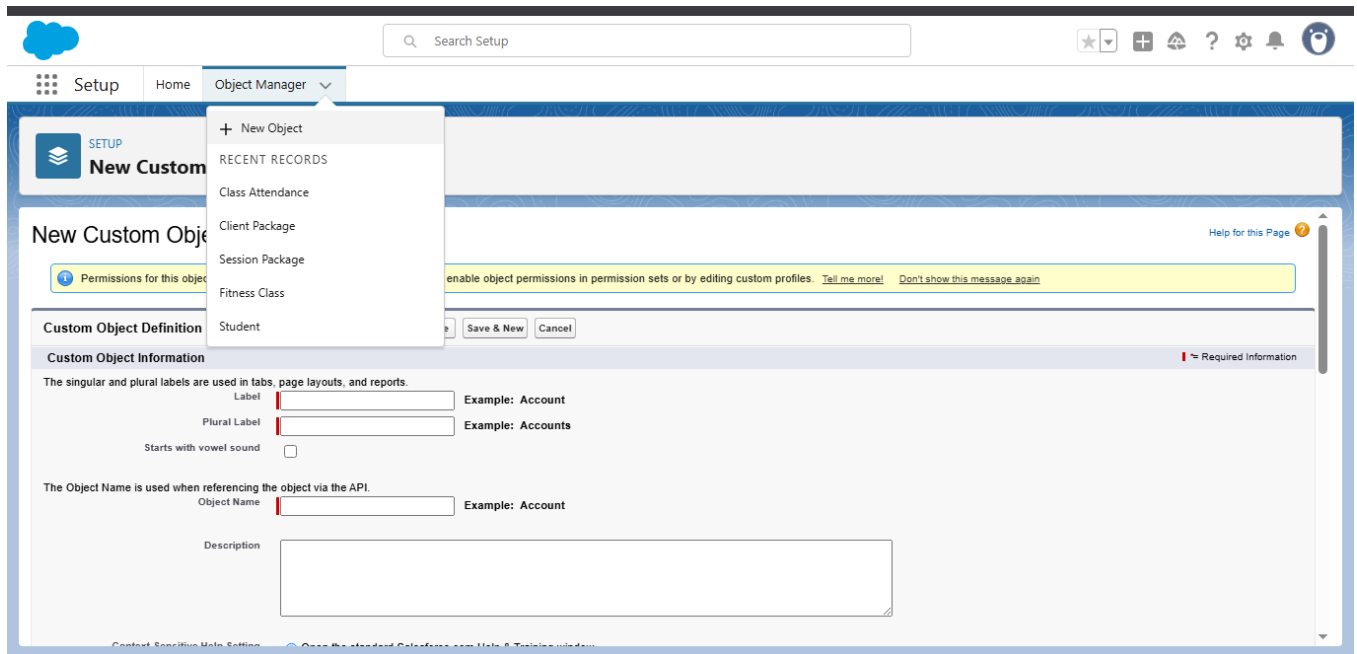
- **Navigation:** Go to **Object Manager > Fitness Class > Fields & Relationships > New**.
 1. **Trainer:** Data Type = `Lookup Relationship` | **Related To** = `User`.
 2. **Day of Week:** Data Type = `Picklist` | **Values** = `Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, Sunday`.
 3. **Class Time:** Data Type = `Time`.

C. Add Fields to the **Client Package** Object

- **Navigation:** Go to **Object Manager > Client Package > Fields & Relationships > New**.
 1. **Client:** Data Type = `Master-Detail Relationship` | **Related To** = `Contact`.
 - *Why: This creates a strong parent-child link. A client package cannot exist without a client.*
 2. **Session Package:** Data Type = `Lookup Relationship` | **Related To** = `Session Package`.
 - *Why: This links the purchase to a specific package type.*
 3. **Purchase Date:** Data Type = `Date`.
 4. **Sessions Remaining:** Data Type = `Number`.

D. Add Fields to the **Class Attendance** Object

- **Navigation:** Go to **Object Manager > Class Attendance > Fields & Relationships > New**.
 1. **Client:** Data Type = Master-Detail Relationship | Related To = Contact.
 - *Why: This links every attendance record directly to a client.*
 2. **Fitness Class:** Data Type = Lookup Relationship | Related To = Fitness Class.
 - *Why: This links the attendance to a specific scheduled class.*
 3. **Attendance Date:** Data Type = Date | Default Value = TODAY().



Final Step for Phase 3: Build Your Custom App

Let's create the "FitTrack Pro" application to bring everything together.

1. Go to **Setup** > In the Quick Find box, type **App Manager** > Click **App Manager**.
2. In the top right corner, click the **New Lightning App** button.
3. **App Details & Branding:**
 - **App Name:** FitTrack Pro
 - Feel free to choose a color or upload a simple fitness icon.
 - Click **Next**.
4. **App Options & Utility Items:**
 - Click **Next** on the next two screens, leaving the default settings.
5. **Navigation Items (Important Step):**
 - This is where you select the tabs for your app. From the 'Available Items' list, find and add the following to the 'Selected Items' list:
 - Home
 - Contacts
 - Fitness Classes
 - Session Packages

- Client Packages
 - Class Attendances
 - Reports
 - Dashboards
 - Click **Next**.
6. **User Profiles:**
- Find the **System Administrator** profile and add it to the 'Selected Profiles' list.
 - Click **Save & Finish**.

New Lightning App

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.


App Details


*App Name ⓘ
Name your app...

*Developer Name ⓘ
Enter a developer name...

Description ⓘ
Enter a description...

App Branding

Image ⓘ
 Upload

Primary Color Hex Value ⓘ
 #0070D2

Org Theme Options

Progress bar: 1 of 5 steps completed

Next

10	Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage reci...	7/20/2025, 8:47 A...	Lightning	✓
11	Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	7/20/2025, 8:47 A...	Lightning	✓