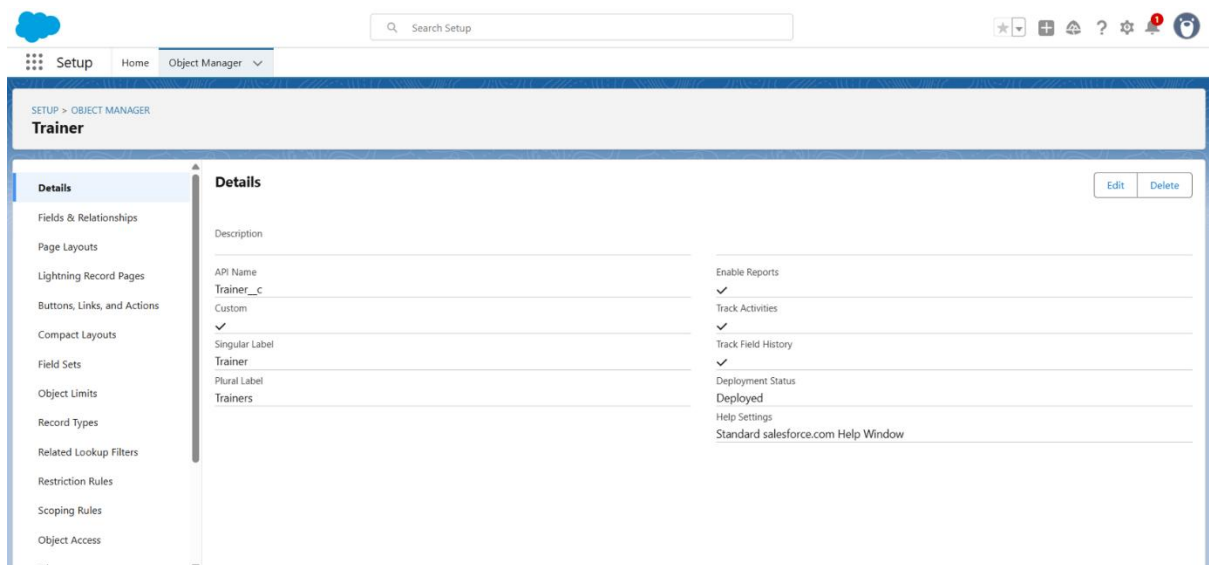


# Community Fitness & Wellness Hub CRM Project

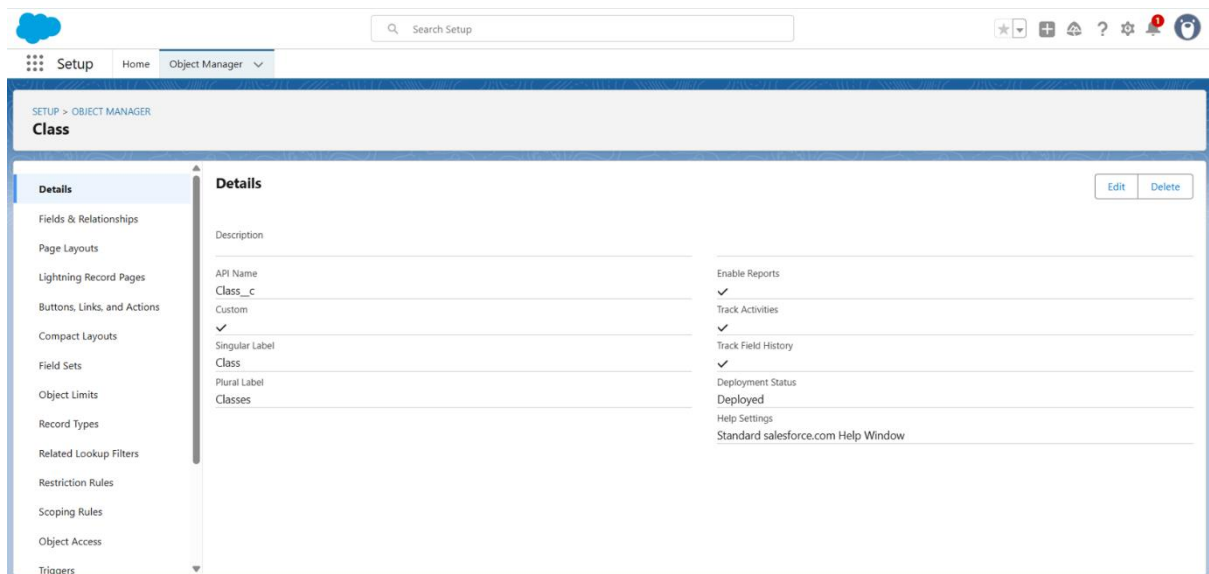
## Phase 3: Data Modeling & Relationships

### 1. Standard & Custom Objects

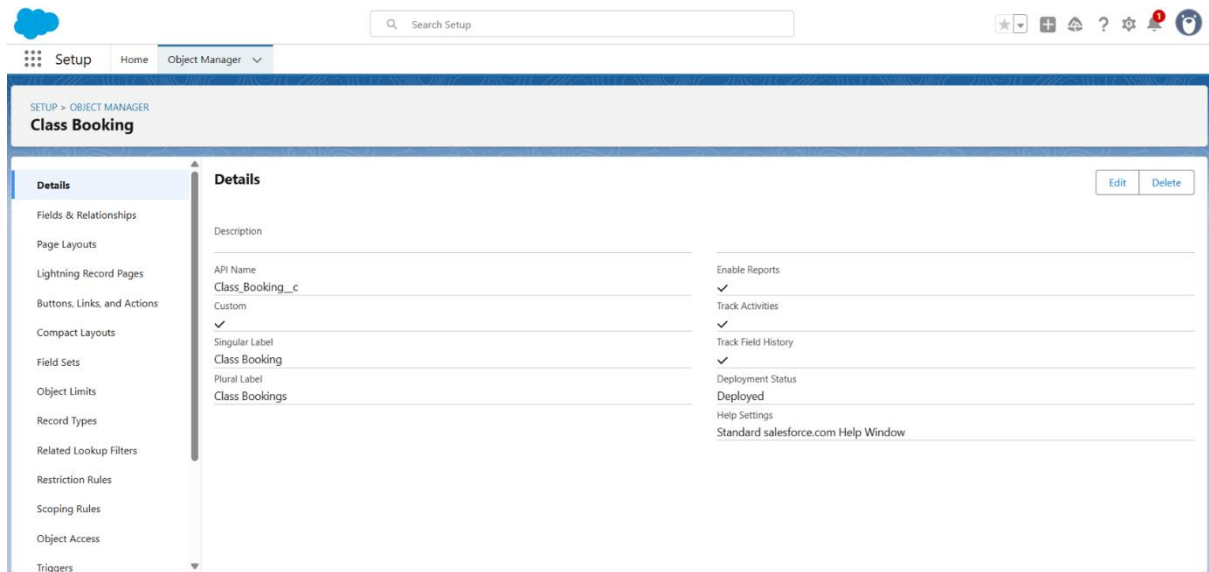
The project utilized the standard Contact object to represent members. Five custom objects were created to support the core functionality: Trainer, Class, Class Booking, Payments, and Loyalty Points.



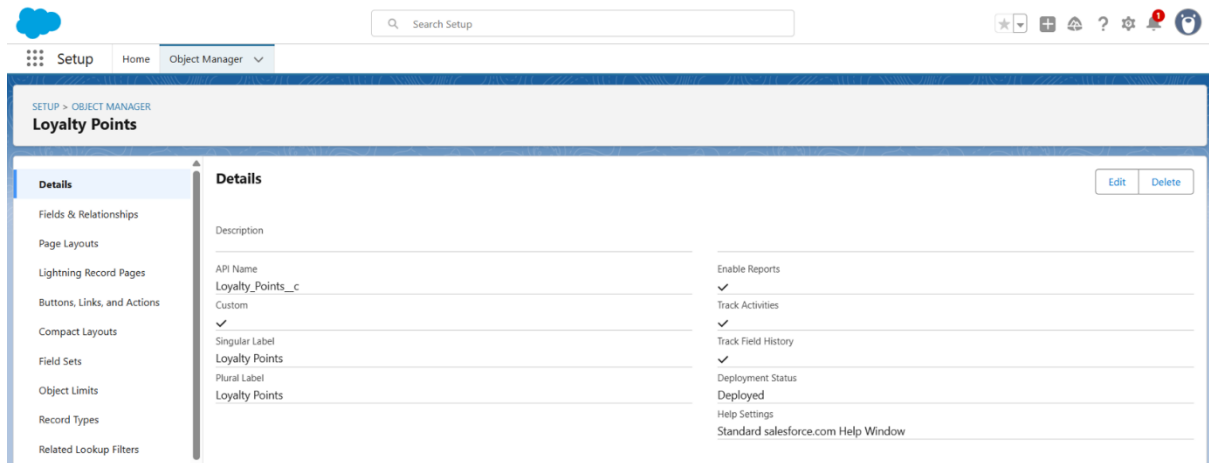
The **Trainer** object was created to store all information about the studio's trainers.



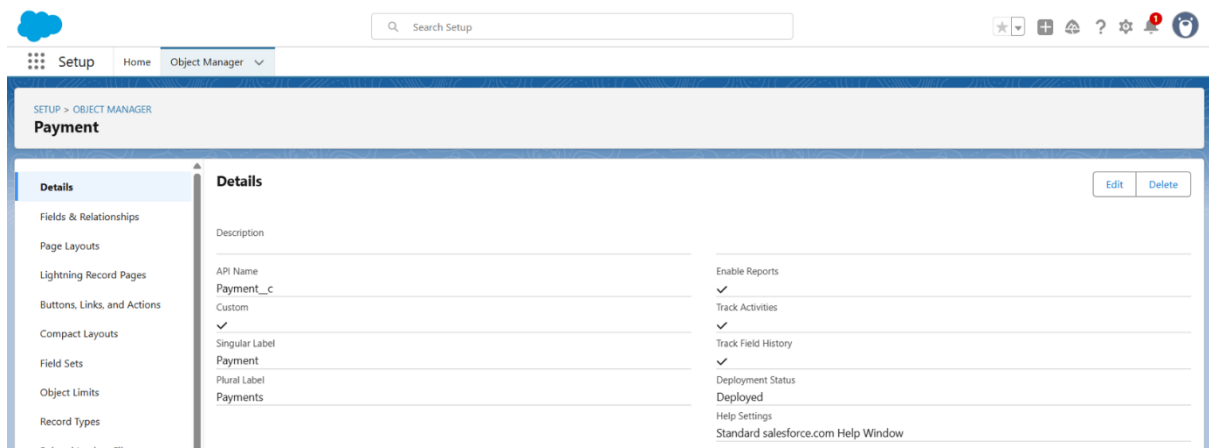
The **Class** custom object was created to manage all classes offered by the studio.



The **Class Booking** custom object was created to track each member's booking.



The **Loyalty Points** custom object was created to manage the member engagement program.



The **Payments** custom object was created to manage all payment records.

## 2.Record Types

Record types were not implemented in this phase. The project utilized the default record type to maintain a simple, focused, and efficient data model.

## 3.Fields

Custom fields were created on each object to capture project-specific data. Examples include a Start Date/Time field on the Class object, a Status picklist on the Class Booking object, and a Points Earned number field on the Loyalty Points object.

The screenshot shows the Salesforce Setup interface for the 'Trainer' 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, and Triggers. The main content area is titled 'Trainer Custom Field Specialty' and includes a 'Back to Trainer' link. Below this is the 'Custom Field Definition Detail' section with tabs for 'Edit', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'Field Information' table lists details for the 'Specialty' field, including its label, name, API name, description, help text, data owner, field usage, data sensitivity level, and compliance categorization. The 'General Options' section shows that the field is required and has a default value of '1'. The 'Picklist Options' section indicates that the picklist is restricted to values defined in the value set.

Field Information	
Field Label	Specialty
Field Name	Specialty
API Name	Specialty__c
Description	
Help Text	
Data Owner	
Field Usage	
Data Sensitivity Level	
Compliance Categorization	
Created By	Amin Sadik Shaik, 9/23/2025, 12:31 AM
Modified By	Amin Sadik Shaik, 9/23/2025, 12:31 AM

General Options	
Required	<input checked="" type="checkbox"/>
Default Value	1

Picklist Options	
Restrict picklist to the values defined in the value set	<input checked="" type="checkbox"/>

A Picklist field named 'Specialty' was created on the Trainer object.

The screenshot shows the Salesforce Setup interface for the 'Trainer' 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, and Triggers. The main content area is titled 'Trainer Custom Field Years of Experience' and includes a 'Back to Trainer' link. Below this is the 'Custom Field Definition Detail' section with tabs for 'Edit', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'Field Information' table lists details for the 'Years of Experience' field, including its label, name, API name, description, help text, data owner, field usage, data sensitivity level, and compliance categorization. The 'General Options' section shows that the field is required, unique, and has a default value of '1'. The 'Picklist Options' section is not applicable for this field type.

Field Information	
Field Label	Years of Experience
Field Name	Years_of_Experience
API Name	Years_of_Experience__c
Description	
Help Text	
Data Owner	
Field Usage	
Data Sensitivity Level	
Compliance Categorization	
Created By	Amin Sadik Shaik, 9/23/2025, 12:32 AM
Modified By	Amin Sadik Shaik, 9/23/2025, 12:32 AM

General Options	
Required	<input checked="" type="checkbox"/>
Unique	<input checked="" type="checkbox"/>
External ID	<input type="checkbox"/>
AI Prediction	<input type="checkbox"/>
Default Value	1

A Number field for 'Years of Experience' was created on the Trainer object.

The screenshot shows the Salesforce Setup interface for the 'Trainer' object. The 'Biography' custom field is configured as a Long Text Area. The field information table is as follows:

Field Information		Object Name	Data Type
Field Label	Biography	Trainer	Long Text Area
Field Name	Biography		
API Name	Biography__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Amin Sadiq Shaik, 9/23/2025, 12:34 AM	Modified By	Amin Sadiq Shaik, 9/23/2025, 12:34 AM

General Options: Default Value is empty.

Long Text Area Options: # Visible Lines is 10, Length is 32,768.

Validation Rules: No rules are defined.

A Long Text Area field for 'Biography' was created on the Trainer object.

The screenshot shows the Salesforce Setup interface for the 'Class' object. The 'Start Date/Time' custom field is configured as a Date/Time field. The field information table is as follows:

Field Information		Object Name	Data Type
Field Label	Start Date/Time	Class	Date/Time
Field Name	Start_Date_Time		
API Name	Start_Date_Time__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Amin Sadiq Shaik, 9/23/2025, 12:37 AM	Modified By	Amin Sadiq Shaik, 9/23/2025, 12:37 AM

General Options: Required is unchecked, Default Value is empty.

Validation Rules: No validation rules defined.

A Date/Time field named 'Start Date/Time' was created on the Class object.

Class Custom Field  
Capacity  
[Back to Class](#)

Validation Rules 0

Custom Field Definition Detail

Field Information

Field Label	Capacity	Object Name	Class
Field Name	Capacity	Data Type	Number
API Name	Capacity__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Amin Sadik Shaik, 9/23/2025, 12:39 AM	Modified By	Amin Sadik Shaik, 9/23/2025, 12:39 AM

General Options

Required	<input type="checkbox"/>
Unique	<input type="checkbox"/>
External ID	<input type="checkbox"/>
AI Prediction	<input type="checkbox"/>
Default Value	

A **Number** field named 'Capacity' was created on the Class object.

Class Custom Field  
Description  
[Back to Class](#)

Validation Rules 0

Custom Field Definition Detail

Field Information

Field Label	Description	Object Name	Class
Field Name	Description	Data Type	Long Text Area
API Name	Description__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Amin Sadik Shaik, 9/23/2025, 12:40 AM	Modified By	Amin Sadik Shaik, 9/23/2025, 12:40 AM

General Options

Default Value	
---------------	--

Long Text Area Options

# Visible Lines	3	Length	32,768
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Validation Rules

[New](#)

[Validation Rules Help](#)

A **Long Text Area** field for 'Description' was created on the Class object.

The screenshot shows the Salesforce Setup interface for the 'Class Booking' object. The 'Status' field is being configured. The left sidebar shows the navigation menu with 'Fields & Relationships' selected. The main content area displays the 'Custom Field Definition Detail' for the 'Status' field.

**Field Information**

Field Label	Status	Object Name	Class Booking
Field Name	Status	Data Type	Picklist
API Name	Status__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Amin Sadik Shaik, 9/23/2025, 12:43 AM	Modified By	Amin Sadik Shaik, 9/23/2025, 12:43 AM

**General Options**

Required: ☐  
Default Value:

**Picklist Options**

Restrict picklist to the values defined in the value set: ☒  
Controlled by:

A **Picklist** field named 'Status' was created on the Class Booking object.

The screenshot shows the Salesforce Setup interface for the 'Payment' object. The 'Amount' field is being configured. The left sidebar shows the navigation menu with 'Fields & Relationships' selected. The main content area displays the 'Custom Field Definition Detail' for the 'Amount' field.

**Field Information**

Field Label	Amount	Object Name	Payment
Field Name	Amount	Data Type	Currency
API Name	Amount__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Amin Sadik Shaik, 9/23/2025, 12:45 AM	Modified By	Amin Sadik Shaik, 9/23/2025, 12:45 AM

**General Options**

Required: ☐  
Default Value:

**Currency Options**

Length: 16  
Decimal Places: 2

A **Currency** field named 'Amount' was created on the Payments object.

The screenshot shows the Salesforce Setup interface for a custom field named 'Status' on the 'Payment' object. The left sidebar contains navigation links: Details, Fields & Relationships (selected), 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, and Triggers. The main content area is titled 'Payment Custom Field Status' with a 'Back to Payment' link. Below the title are tabs for 'Custom Field Definition Detail' (selected), 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'Field Information' section displays a table with the following data:

Field Label	Status	Object Name	Payment
Field Name	Status	Data Type	Picklist
API Name	Status__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Amin Sadik Shaik, 9/23/2025, 12:47 AM	Modified By	Amin Sadik Shaik, 9/23/2025, 12:47 AM

The 'General Options' section includes 'Required' (checkbox), 'Default Value' (text input with 'i' icon), and 'Picklist Options' (checkbox for 'Restrict picklist to the values defined in the value set').

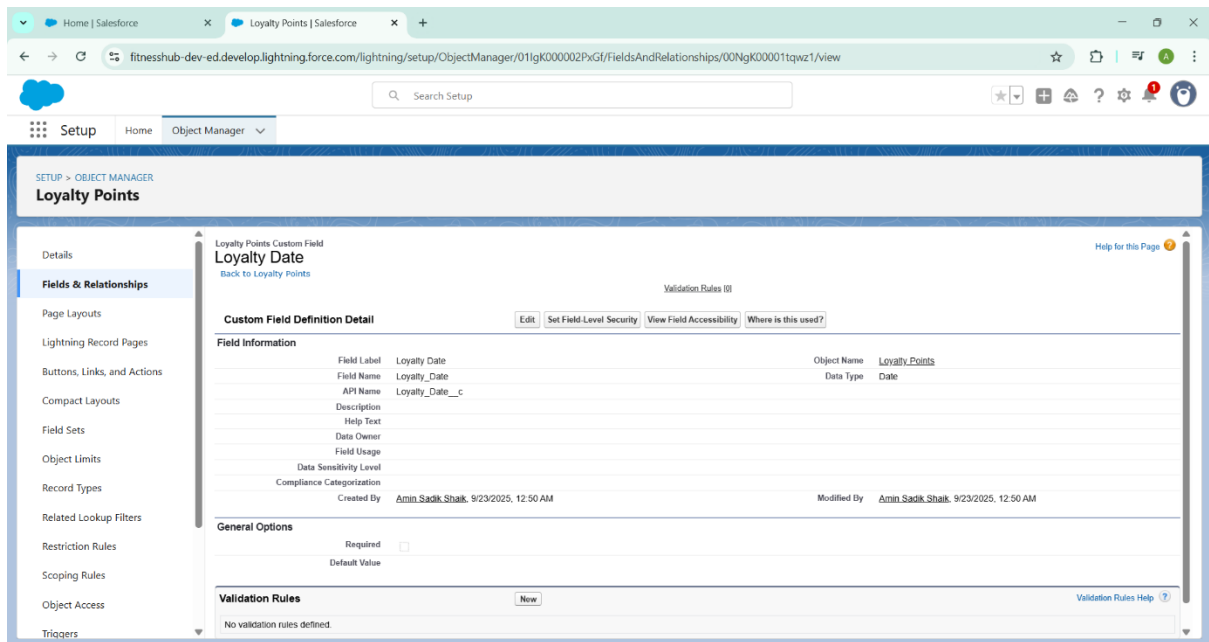
A **Picklist** field named 'Status' was created on the Payments object.

The screenshot shows the Salesforce Setup interface for a custom field named 'Points Earned' on the 'Loyalty Points' object. The left sidebar contains navigation links: Details, Fields & Relationships (selected), 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, and Triggers. The main content area is titled 'Loyalty Points Custom Field Points Earned' with a 'Back to Loyalty Points' link. Below the title are tabs for 'Custom Field Definition Detail' (selected), 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'Field Information' section displays a table with the following data:

Field Label	Points Earned	Object Name	Loyalty Points
Field Name <th>Points Earned</th> <td>Data Type</td> <td>Number</td>	Points Earned	Data Type	Number
API Name <td>Points_Earned__c</td> <td></td> <td></td>	Points_Earned__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Amin Sadik Shaik, 9/23/2025, 12:48 AM	Modified By	Amin Sadik Shaik, 9/23/2025, 12:48 AM

The 'General Options' section includes 'Required' (checkbox), 'Unique' (checkbox), 'External ID' (checkbox), 'AI Prediction' (checkbox), and 'Default Value' (text input).

A **Number** field named 'Points Earned' was created on the Loyalty Points object.



A **Date** field named 'Loyalty Date' was created on the Loyalty Points object.

#### 4.Compact Layouts

Custom compact layouts were configured for each object. These layouts display the most critical information in the highlights panel at the top of a record, allowing for quick and efficient data consumption.

#### 5.Junction Objects

The Class Booking custom object was designed to function as a **junction object**. It connects the Class object and the Contact object, allowing a member to be associated with multiple classes, and a class to have multiple members.

#### 6.Lookup vs Master-Detail vs Hierarchical Relationships

- Lookup relationships were used to connect all custom objects. This was a strategic choice to ensure a flexible data model where related records can be linked without strict ownership requirements, preventing cascading deletions and supporting multiple business processes.



The screenshot shows the Salesforce Setup interface for a custom field named 'Trainer' on the 'Class' 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, and Triggers. The 'Fields & Relationships' section is selected.

The main content area is titled 'Trainer' and includes a 'Back to Class' link. Below this, there are tabs for 'Custom Field Definition Detail', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'Custom Field Definition Detail' tab is active, showing the following information:

Field Information	
Field Label	Trainer
Field Name	Trainer
API Name	Trainer__c
Description	
Help Text	
Data Owner	
Field Usage	
Data Sensitivity Level	
Compliance Categorization	
Created By	Amin Sadik Shaik, 9/23/2025, 12:05 AM
Modified By	Amin Sadik Shaik, 9/23/2025, 12:05 AM

Below the field information, the 'Lookup Options' section shows:

- Related To: Trainer
- Related List Label: Classes
- Required: ☐
- What to do if the lookup record is deleted?: Clear the value of this field.

The 'Lookup Filter' section is currently empty.

A **Lookup relationship** was created on the Class object to link it to a specific Trainer.

The screenshot shows the Salesforce Setup interface for a custom field named 'Class' on the 'Class Booking' object. The left sidebar is the same as in the previous screenshot, with 'Fields & Relationships' selected.

The main content area is titled 'Class' and includes a 'Back to Class Booking' link. Below this, there are tabs for 'Custom Field Definition Detail', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'Custom Field Definition Detail' tab is active, showing the following information:

Field Information	
Field Label	Class
Field Name	Class
API Name	Class__c
Description	
Help Text	
Data Owner	
Field Usage	
Data Sensitivity Level	
Compliance Categorization	
Created By	Amin Sadik Shaik, 9/23/2025, 12:08 AM
Modified By	Amin Sadik Shaik, 9/23/2025, 12:08 AM

Below the field information, the 'Lookup Options' section shows:

- Related To: Class
- Related List Label: Class Bookings
- Required: ☐
- What to do if the lookup record is deleted?: Clear the value of this field.

The 'Lookup Filter' section is currently empty.

A **Lookup relationship** was created on the Class Booking object to link each booking to its parent Class.

Class Booking Custom Field

Contact

Back to Class Booking

Validation Rules ⓘ

Custom Field Definition Detail

Edit Set Field-Level Security View Field Accessibility Where is this used?

Field Information

Field Label	Contact	Object Name	Class_Booking
Field Name	Contact	Data Type	Lookup
API Name	Contact__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Amin Sadik Shaik, 9/23/2025, 12:13 AM	Modified By	Amin Sadik Shaik, 9/23/2025, 12:13 AM

Lookup Options

Related To	Contact	Child Relationship Name	Class_Bookings
Related List Label	Class Bookings		
Required	<input type="checkbox"/>		
What to do if the lookup record is deleted?	Clear the value of this field.		

Lookup Filter

A **Lookup relationship** was created on the Class Booking object to link a booking to the member's Contact record.

Payment Custom Field

Class Booking

Back to Payment

Validation Rules ⓘ

Custom Field Definition Detail

Edit Set Field-Level Security View Field Accessibility Where is this used?

Field Information

Field Label	Class Booking	Object Name	Payment
Field Name	Class_Booking	Data Type	Lookup
API Name	Class_Booking__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Amin Sadik Shaik, 9/23/2025, 12:27 AM	Modified By	Amin Sadik Shaik, 9/23/2025, 12:27 AM

Lookup Options

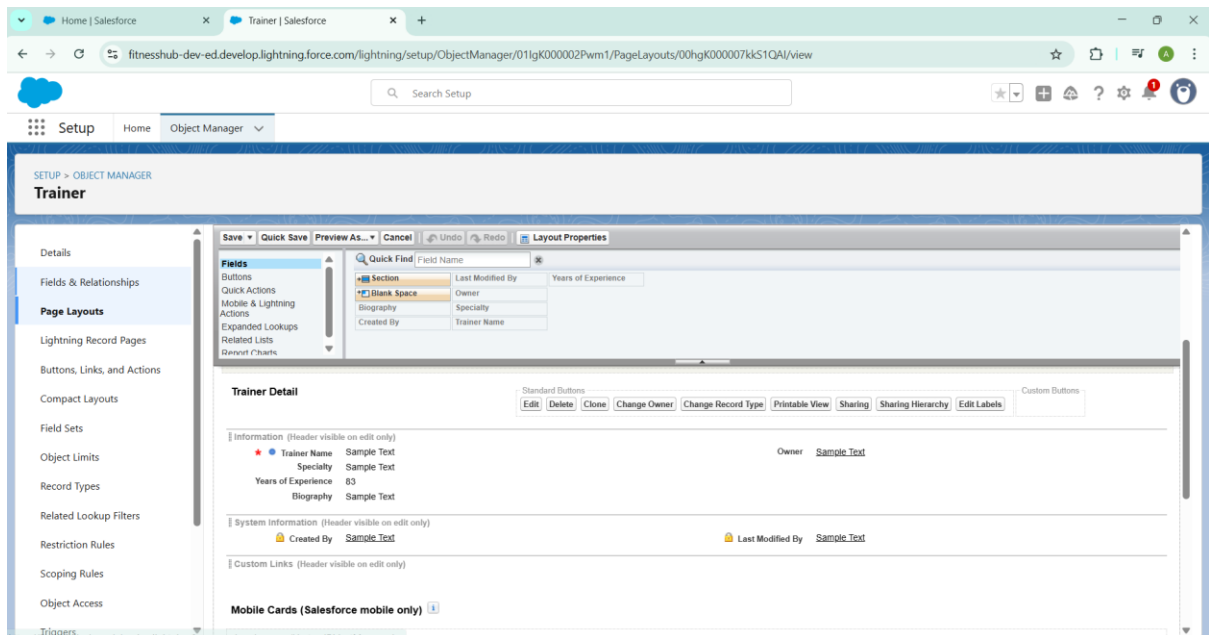
Related To	Class_Booking	Child Relationship Name	Payments
Related List Label	Payments		
Required	<input type="checkbox"/>		
What to do if the lookup record is deleted?	Clear the value of this field.		

Lookup Filter

A **Lookup relationship** was created on the Payments object to link each payment record to its corresponding Class Booking.

## 7. Page Layouts

- Custom page layouts were created for each object to ensure a clean and organized user interface. Fields were arranged to optimize data entry and viewing, and relevant related lists were added to provide a complete view of connected records.

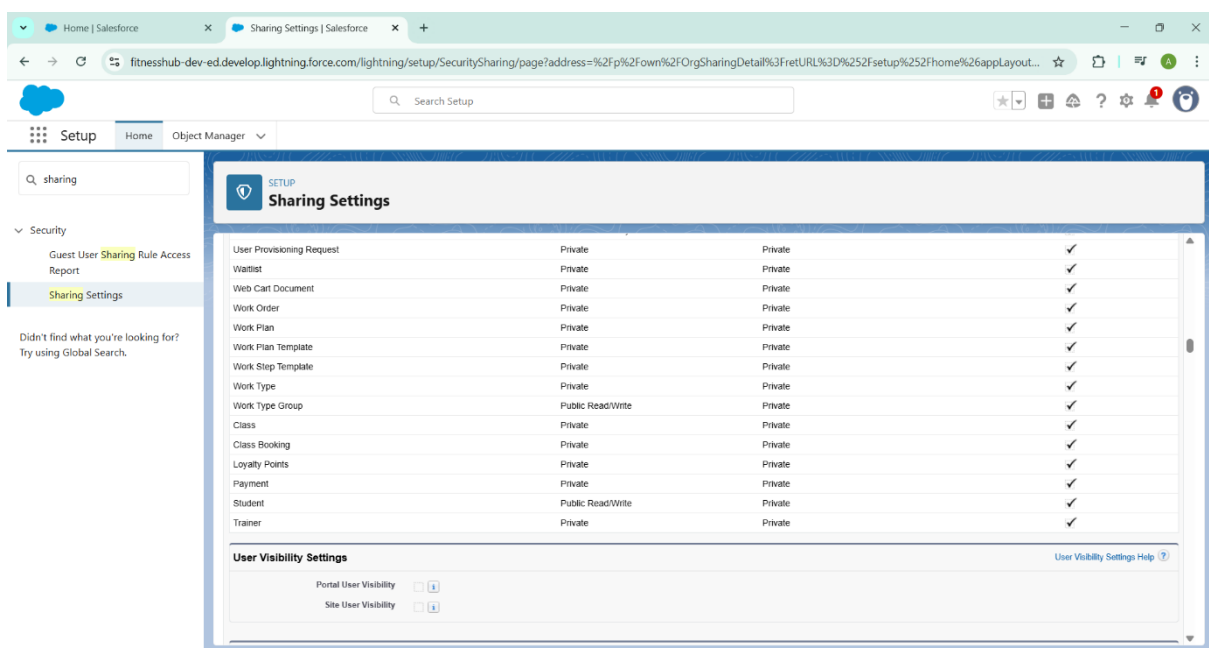


A custom page layout for the Trainer object was configured, displaying all relevant fields for a trainer's information.

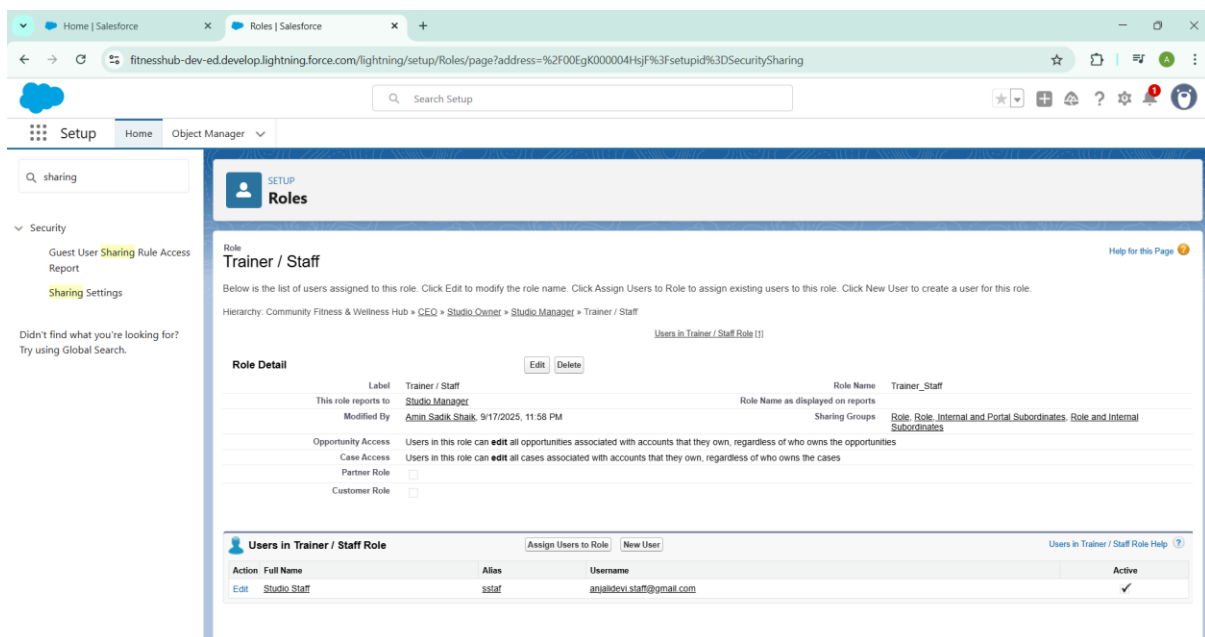
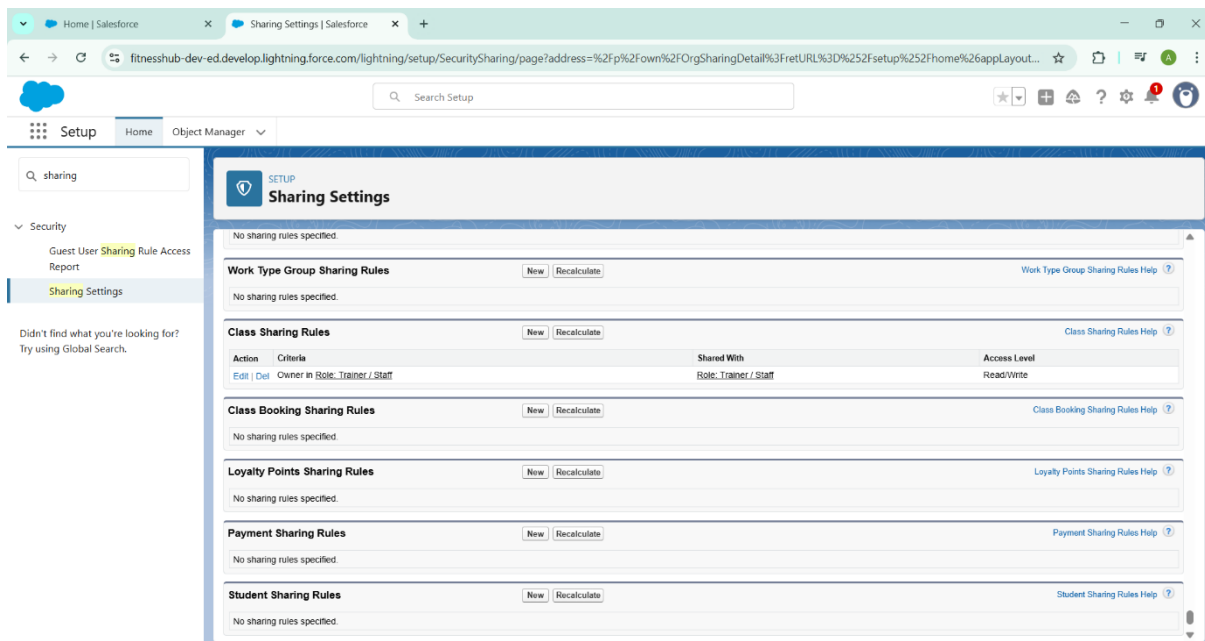
Similar Way , A custom page layout for the Class object was configured, organizing all class details. A custom page layout for the Class Booking object was configured, showing the status and related member/class records. A custom page layout for the Payment object was configured, displaying the payment amount and status. A custom page layout for the Loyalty Points object was configured, showing the earned points and the date are Created.

## 8.Schema Builder

The Schema Builder was used to visually confirm the data model. This tool provided a clear diagram of all custom objects and their relationships, ensuring the data structure was correct before proceeding with automation.



The Organization-Wide Defaults (OWD) were set to **Private** for all custom objects, ensuring data privacy by restricting records to their owners.



A **Sharing Rule** was created for the Class object to share records with the 'Trainer / Staff' role, allowing trainers to see all classes they are responsible for.

## 9.External Objects

External objects were not implemented in this project as they were out of scope. The project focused on building a robust data model entirely within the Salesforce platform.