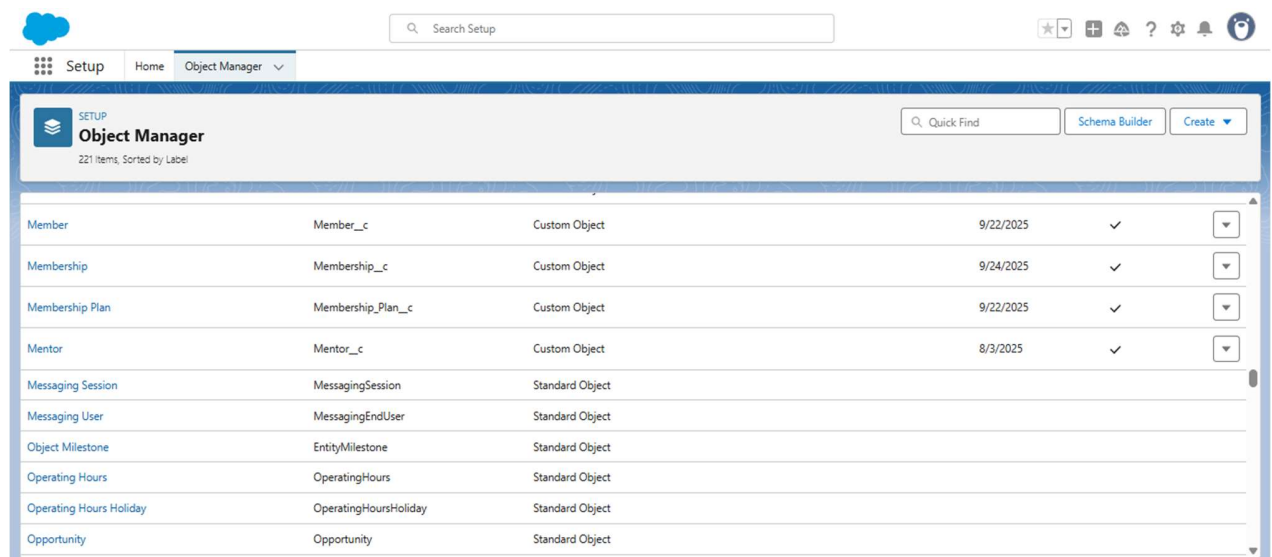# FitCRM — Phase 3: Data Modeling & Relationships

Step 1 — Standard & Custom Objects

Custom Objects created: Member__c, Trainer__c, Membership__c, MembershipPlan__c, Payment__c, Attendance__c, Referral__c.

Standard Objects used: User, Report, Dashboard.

Step 2 — Fields

Member__c
- First Name (Standard)
- Last Name
- Email (Email)
- Phone (Phone)
- DOB (Date)
- Address (Text)
- Gender (Picklist : Male, Female)
- MembershipPlan__c (Lookup → MembershipPlan__c)
- AssignedTrainer__c (Lookup → Trainer__c)

Fields & Relationships
15 Items, Sorted by Field Label

Details				
Fields & Relationships		Quick Find	New	Deleted Fields	Field Dependencies	Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address__c	Text(255)		
Assigned Trainer	Assigned_Trainer__c	Lookup(Trainer)		✓
Created By	CreatedById	Lookup(User)		
DOB	DOB__c	Date		
Email	Email__c	Email (Unique)		✓
External Id	External_Id__c	Text(40) (External ID) (Unique Case Insensitive)		✓
First Name	First__c	Text(50)		
Gender	Gender__c	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
Last Name	Last_Name__c	Text(50)		

Side panel: 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

Trainer__c

- Trainer Name (Text)
- Trainer Email (Email)
- Trainer Phone (Phone)
- Specialization (Picklist: Yoga, Strength, Cardio, CrossFit)
- Experience Years (Number)

Fields & Relationships
10 Items, Sorted by Field Label

Details				
Fields & Relationships		Quick Find	New	Deleted Fields	Field Dependencies	Set History Tracking
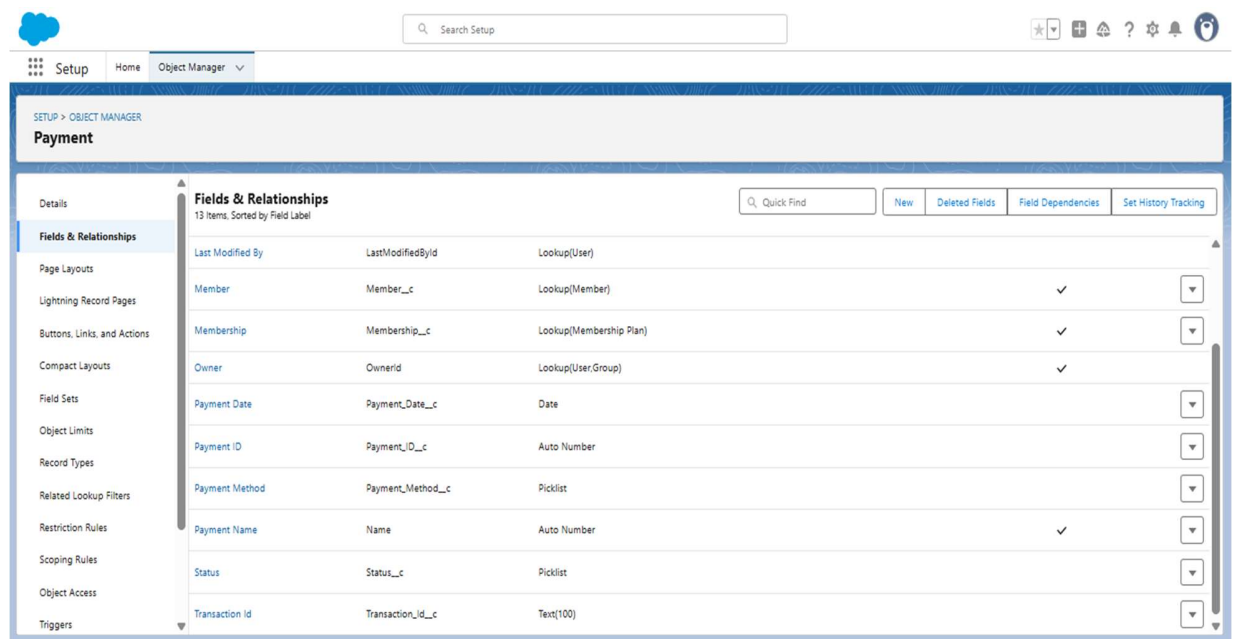
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Experience Years	Experience_Years__c	Number(2, 0)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Record Name	Record_Name__c	Text(50)		
Specialization	Specialization__c	Picklist (Multi-Select)		
Trainer Email	Trainer_Email__c	Email (Unique)		✓
Trainer Name	Name	Text(80)		✓
Trainer Phone	Trainer_Phone__c	Phone		
User Lookup	User_Lookup__c	Lookup(User)		✓

Side panel: 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

MembershipPlan__c

- Membership ID (Auto Number)
- Duration Months (Number)
- Price (Currency)
- Plan (Picklist: Monthly, Annual)

Membership__c

- Member__c (Lookup → Member__c)
- Member Email (Email)
- Plan__c (Lookup → MembershipPlan__c)
- StartDate__c (Date)
- EndDate__c (Date)
- Status__c (Picklist: Active, Expired, Cancelled)
- Auto Renew (Checkbox)

Payment__c

- Member__c (Lookup → Member__c)
- Membership_c (Lookup → Membership_Plan_c)
- Payment_Date_c (Date)
- Payment_Method_c (Picklist : Cash, Card, UPI, Netbanking, Wallet)
- Payment_Name_c (Auto Number)
- Amount__c (Currency)
- Date__c (Date)
- Status__c (Picklist: Paid, Pending, Failed)

Attendance__c

- Member__c (Lookup → Member__c)
- Trainer__c (Lookup → Trainer__c)
- Attendance_ID_c (Auto Number)
- Duration_Minutes_c (Text)
- Location_c (Text)
- CheckIn__DateTime_c (Date/Time)
- WorkoutType__c (Picklist: Cardio, Strength, Yoga, Other)

Referral__c

- Referrer__c (Lookup → Member__c)
- Referral_Name__c (Text)
- Referral_Phone__c (Phone)
- Referral_ID_c (Auto Number)
- Referral_Status__c (Picklist: Pending, Joined, Declined)

Step 3 — Record Types

Membership__c → Record Types: Monthly, Annual. Picklist availability changes based on type.
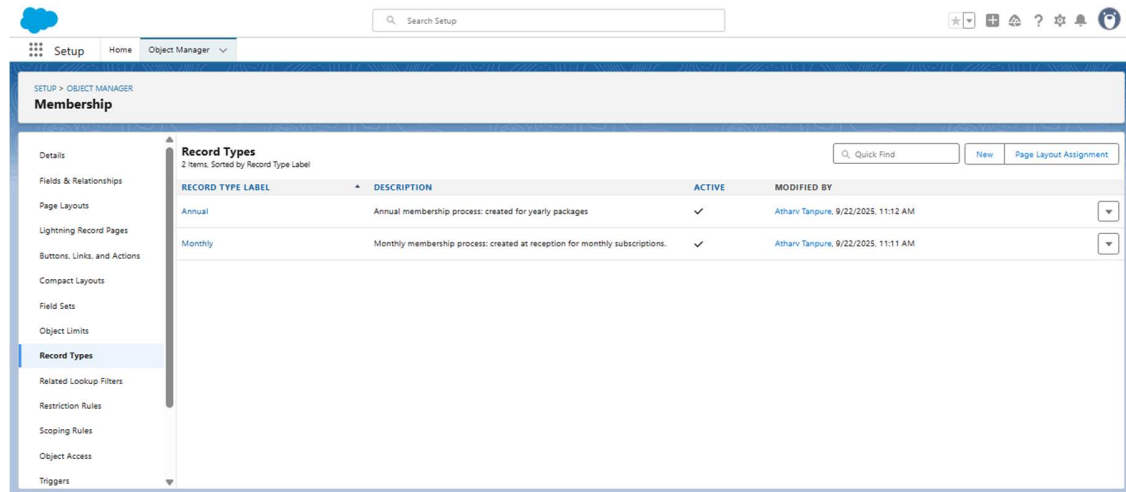
Step 4 — Page Layouts

Member Layout → personal info, membership details, trainer assignment.

Trainer Layout → specialties, experience, assigned members.

Membership Layouts → separate layouts for Monthly vs Annual.

Payment Layout → amount, date, status.
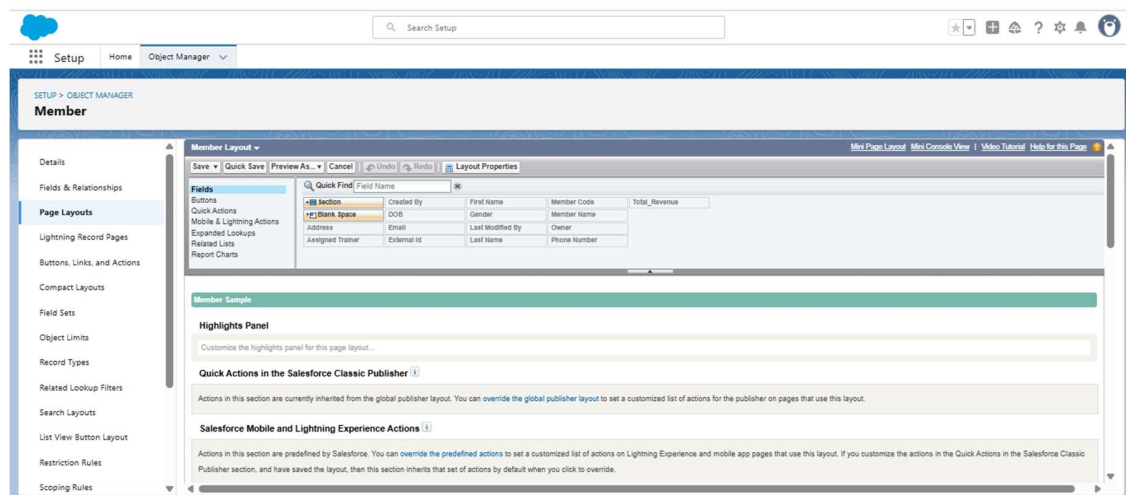
Step 5 — Compact Layouts

Member Compact Layout → Name, Email, Phone, AssignedTrainer__c, Status.

Trainer Compact Layout → Name, Specialty__c, Experience__c.

Step 6 — Schema Builder

Visual diagram shows relationships:

Member__c → Membership__c → MembershipPlan__c
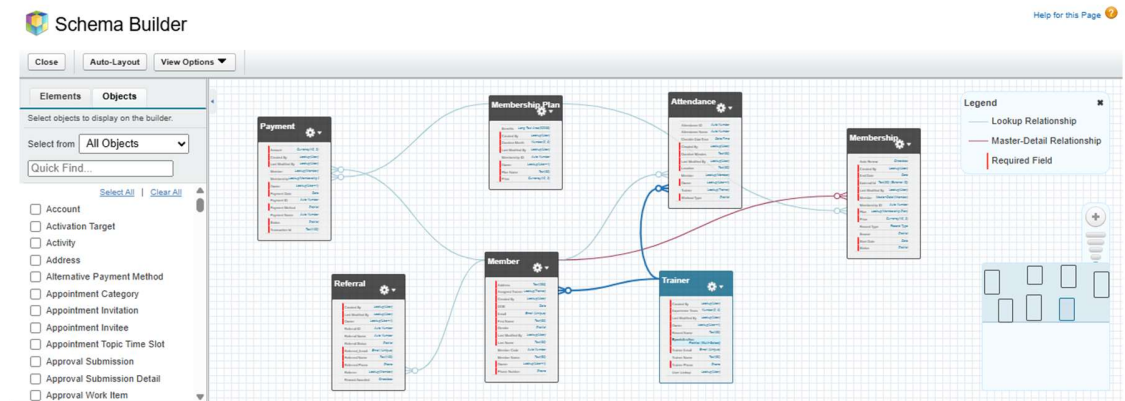
Member__c → Payment__c

Member__c → Attendance__c

Member__c → Referral__c

Trainer__c → Attendance__c

Trainer__c → Member__c

Step 7 — Relationship Types

Master-Detail (Membership → Member, optional)

Lookup (Payment → Member, Attendance → Member, Trainer → Member).