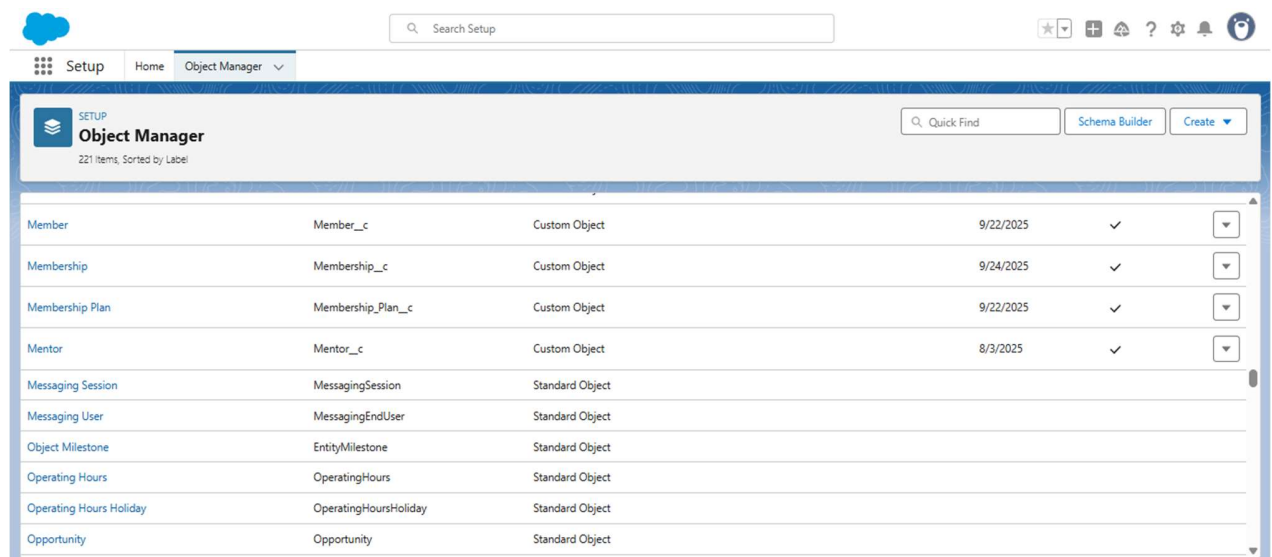


FitCRM — Phase 3: Data Modeling & Relationships

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.



The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar labeled 'Search Setup' is on the right. The main header of the Object Manager shows 'Object Manager' with a sub-header '221 Items, Sorted by Label'. Below this is a table listing various objects.

Object Name	API Name	Object Type	Created Date	Status	Actions
Member	Member__c	Custom Object	9/22/2025	✓	▼
Membership	Membership__c	Custom Object	9/24/2025	✓	▼
Membership Plan	MembershipPlan__c	Custom Object	9/22/2025	✓	▼
Mentor	Mentor__c	Custom Object	8/3/2025	✓	▼
Messaging Session	MessagingSession	Standard Object			
Messaging User	MessagingEndUser	Standard Object			
Object Milestone	EntityMilestone	Standard Object			
Operating Hours	OperatingHours	Standard Object			
Operating Hours Holiday	OperatingHoursHoliday	Standard Object			
Opportunity	Opportunity	Standard Object			

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)

SETUP > OBJECT MANAGER

Member

Details

Fields & Relationships
15 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
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)		

Trainer__c

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

Setup Home Object Manager

Q Search Setup

SETUP > OBJECT MANAGER

Trainer

Details

Fields & Relationships
10 Items, Sorted by Field Label

Q Quick Find New Deleted Fields Field Dependencies Set History Tracking

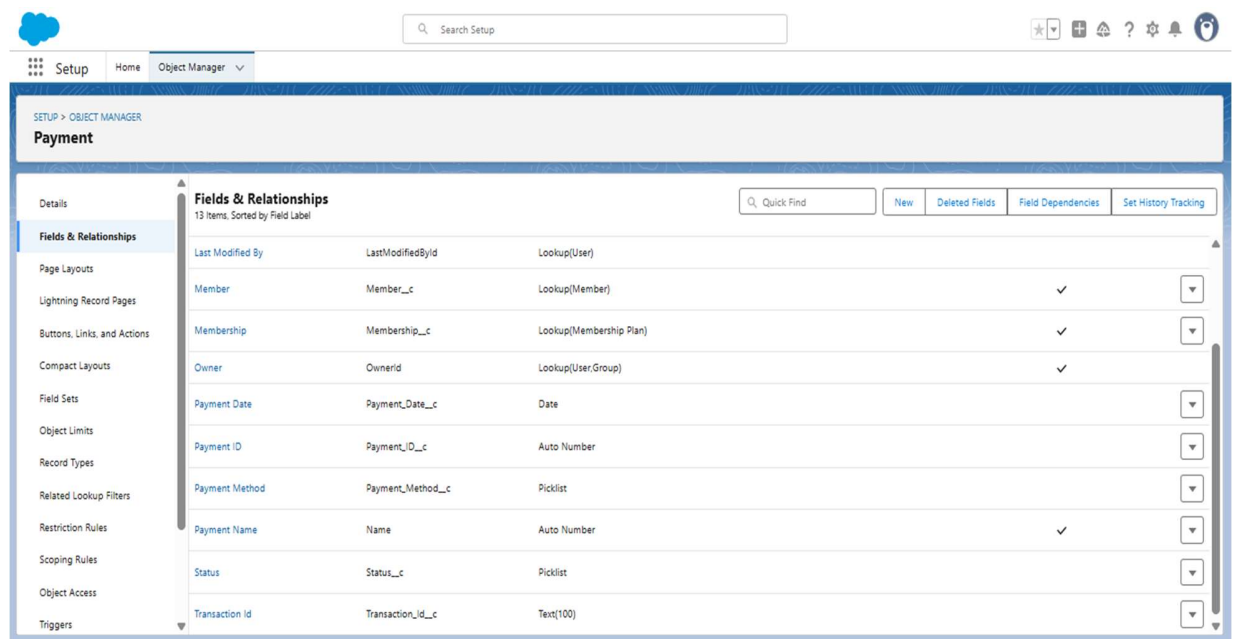
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Experience Years	Experience_Years__c	Number(2, 0)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User Group)		✓
Record Name	Record_Name__c	Text(50)		
Specialization	Specialization__c	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)		✓

MembershipPlan__c

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

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)



The screenshot shows the Salesforce Setup interface, specifically the Object Manager for the Payment 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 'Payment' and shows the 'Fields & Relationships' section. It lists 13 items, sorted by Field Label. The table below represents the data shown in the screenshot.

Field Label	Field Name	Field Type	Relationship	Checkmark	Action
Last Modified By	LastModifiedById	Lookup(User)			
Member	Member__c	Lookup(Member)		✓	▼
Membership	Membership__c	Lookup(Membership Plan)		✓	▼
Owner	OwnerId	Lookup(User, Group)		✓	
Payment Date	Payment_Date__c	Date			▼
Payment ID	Payment_ID__c	Auto Number			▼
Payment Method	Payment_Method__c	Picklist			▼
Payment Name	Name	Auto Number		✓	▼
Status	Status__c	Picklist			▼
Transaction Id	Transaction_Id__c	Text(100)			▼

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)

Setup Home Object Manager

SETUP > OBJECT MANAGER

Attendance

Details

Fields & Relationships
11 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Attendance ID	Attendance_ID__c	Auto Number		
Attendance Name	Name	Auto Number		✓
Checkin DateTime	Checkin_DateTime__c	Date/Time		
Created By	CreatedBy	Lookup(User)		
Duration Minutes	Duration_Minutes__c	Text(50)		
Last Modified By	LastModifiedById	Lookup(User)		
Location	Location__c	Text(50)		
Member	Member__c	Lookup(Member)		✓
Owner	OwnerId	Lookup(User/Group)		✓
Trainer	Trainer__c	Lookup(Trainer)		✓

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)

Setup Home Object Manager

SETUP > OBJECT MANAGER

Referral

Details

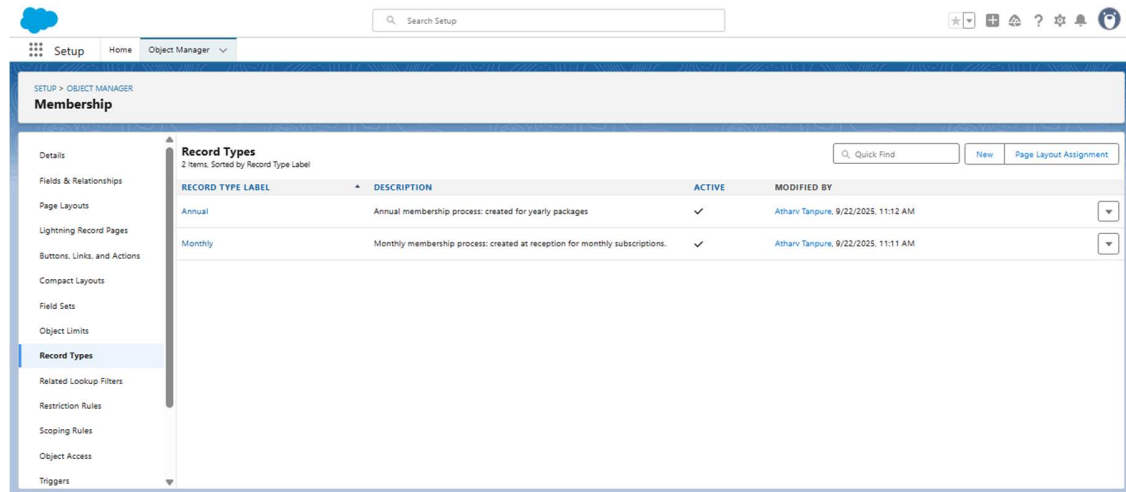
Fields & Relationships
11 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User/Group)		✓
Referral ID	Referral_ID__c	Auto Number		
Referral Name	Name	Auto Number		✓
Referral Status	Referral_Status__c	Picklist		
Referred Name	Referred_Name__c	Text(100)		
Referred Phone	Referred_Phone__c	Phone		
Referred Email	Referred_Email__c	Email (Unique)		✓
Referrer	Referrer__c	Lookup(Member)		✓
Reward Awarded	Reward_Awarded__c	Checkbox		

Step 3 — Record Types

Membership__c → Record Types: Monthly, Annual. Picklist availability changes based on type.



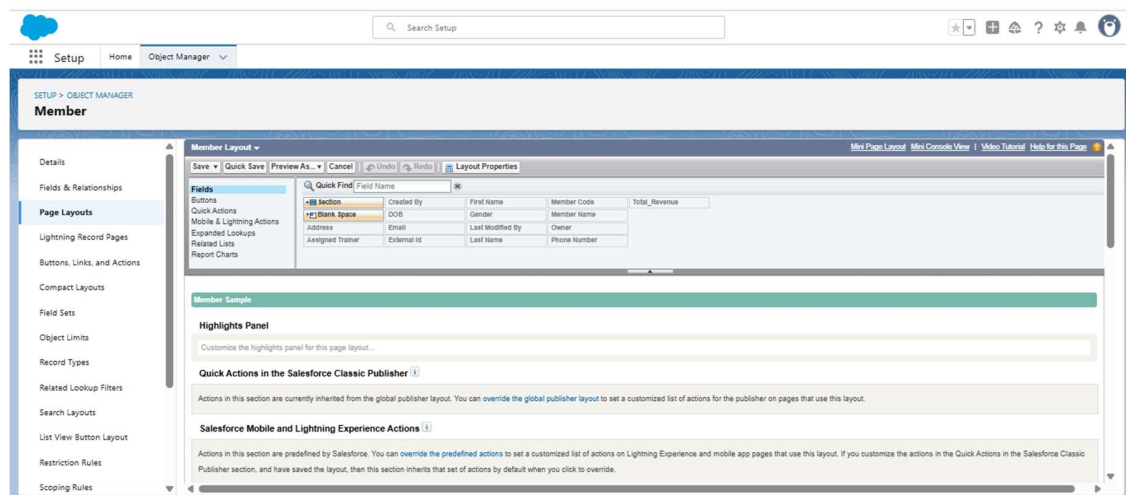
Step 4 — Page Layouts

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.

The screenshot shows the Salesforce Setup interface for configuring a Compact Layout for the 'Member' object. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, and Compact Layouts (which is currently selected). The main content area is titled 'Member Compact Layout' and includes a 'Back to Member' link. Below the title, there is a 'Compact Layout Detail' section with buttons for 'Edit', 'Clone', 'Delete', and 'Compact Layout Assignment'. The detail section shows the following information:

Label	Member Compact Layout	Object Name	Member
API Name	Member_Compact_Layout		
Included Fields	Assigned Trainer First Name Last Name		
Created By	Ashay Tanpure, 9/22/2025, 11:31 AM	Modified By	Ashay Tanpure, 9/22/2025, 11:31 AM

At the bottom of the detail section, there are buttons for 'Edit', 'Clone', 'Delete', and 'Compact Layout Assignment'.

Trainer Compact Layout → Name, Specialty__c, Experience__c.

The screenshot shows the Salesforce Setup interface for configuring a Compact Layout 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, and Compact Layouts (which is currently selected). The main content area is titled 'Trainer Compact Layout' and includes a 'Back to Trainer' link. Below the title, there is a 'Compact Layout Detail' section with buttons for 'Edit', 'Clone', 'Delete', and 'Compact Layout Assignment'. The detail section shows the following information:

Label	Trainer Compact Layout	Object Name	Trainer
API Name	Trainer_Compact_Layout		
Included Fields	Experience Years Trainer Email Trainer Name Trainer Phone		
Created By	Ashay Tanpure, 9/22/2025, 11:40 AM	Modified By	Ashay Tanpure, 9/22/2025, 11:40 AM

At the bottom of the detail section, there are buttons for 'Edit', 'Clone', 'Delete', and 'Compact Layout Assignment'.

Step 6 — Schema Builder

Visual diagram shows relationships:

Member_c → Membership_c → MembershipPlan_c

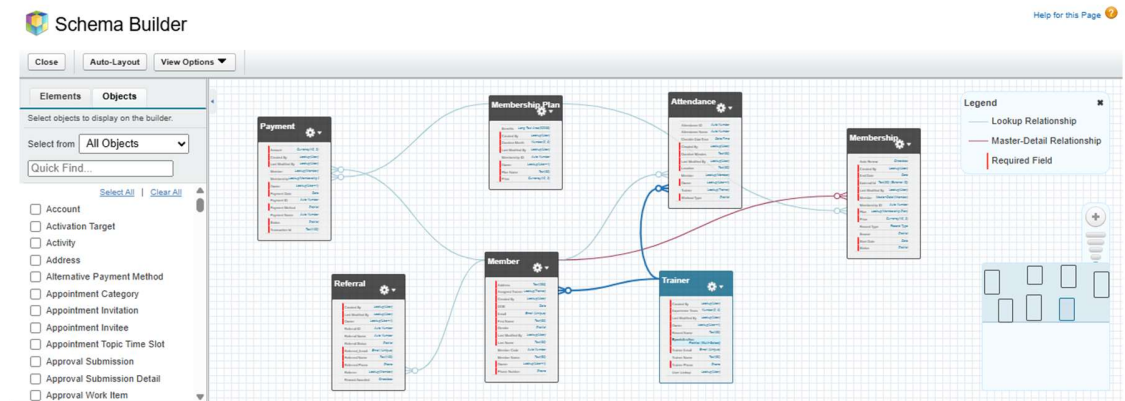
Member_c → Payment_c

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).

The screenshot shows the 'Payment' object configuration page. The 'Fields & Relationships' section is expanded, showing a list of fields and their relationships. The table below represents the data shown in this section.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount_c	Currency(10, 2)		
Created By	CreatedByid	Lookup(User)		
External id	External_Id_c	Text(50) (External ID) (Unique Case Insensitive)		✓
Last Modified By	LastModifiedByid	Lookup(User)		
Member	Member_c	Lookup(Member)		✓
Membership	Membership_c	Lookup(Membership Plan)		✓
Owner	Ownerid	Lookup(User/Group)		✓
Payment Date	Payment_Date_c	Date		
Payment ID	Payment_ID_c	Auto Number		
Payment Method	Payment_Method_c	Picklist		