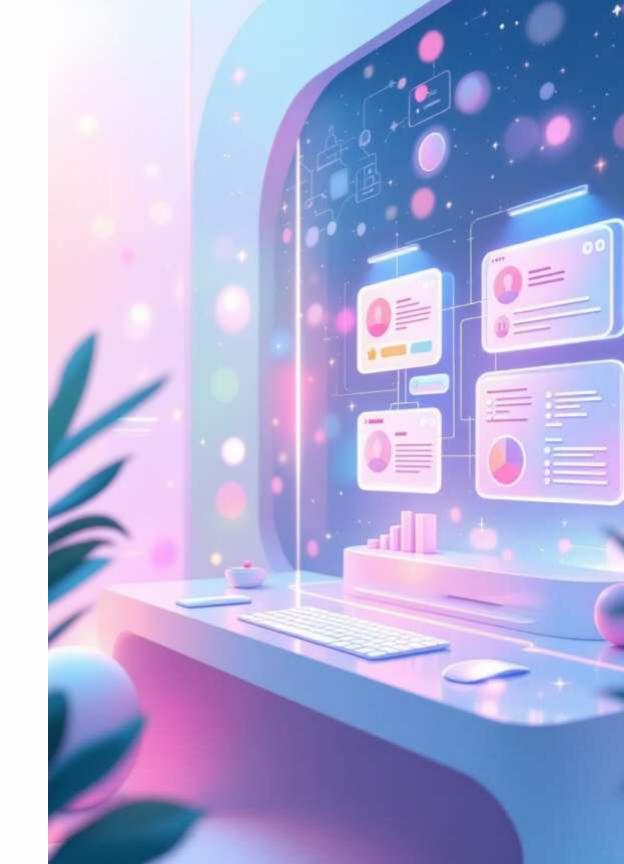# Phase 3 - Data Modeling & Relationships

This document provides a step-by-step summary of all data modeling tasks completed for Phase 3 of the Salon Management System project, following the official project roadmap.
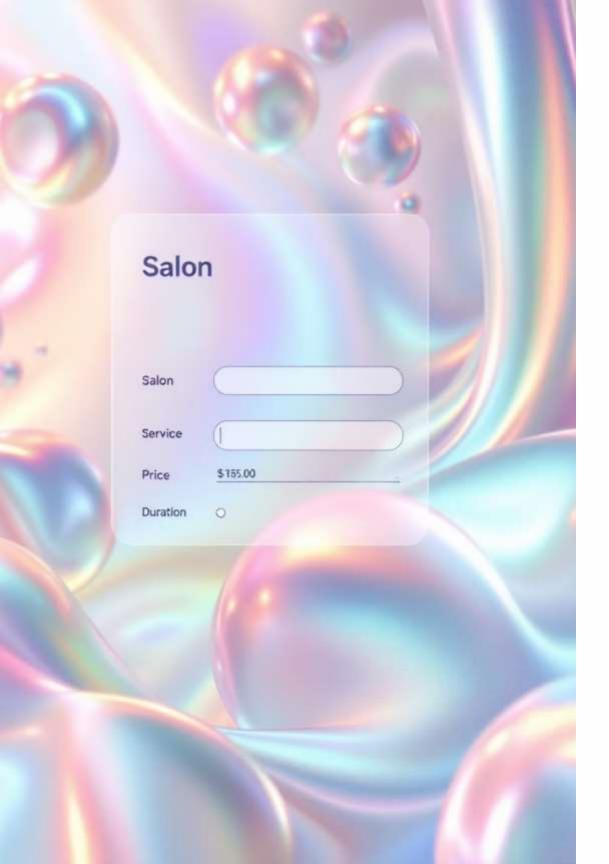
Standard & Custom Objects

Standard Objects Utilized:

- The standard Contact object was designated to store all client information.

- The standard User object was designated to store all staff information (e.g., Stylists).

Custom Objects Created:

- Navigated to Setup > Object Manager > Create > Custom Object.

- Created the Service custom object to store the salon's list of offerings. The Record Name was set to an Auto-Number (SERV-{0000}) and a custom "Service Name" picklist was created.

- Created the Appointment custom object to be the central object of the application. The Record Name was set to an Auto-Number (APP-{0000}).

- For both custom objects, the "Launch New Custom Tab Wizard" was used to create and display new tabs in the user interface.

Service Object Fields Configuration

Fields Created on Service Object:

Navigated to Setup > Object Manager > Service > Fields & Relationships.

Service Name

Picklist field to ensure data consistency

Price

Currency field for service pricing

Duration (Minutes)

Number field for service duration

Service

Details				
Fields & Relationships				
Page Layouts				

Fields & Relationships
7 Items, Sorted by Field Label

Quick Find   New   Deleted Fields   Field Dependencies   Set History Tracking

FIELD LABEL ▲	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Duration(MInutes)	Duration_MInutes__c	Number(3, 0)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Price	Price__c	Currency(16, 2)		
Service Name	Service_Name__c	Picklist (Multi-Select)		
Service Name	Name	Auto Number		✓

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
Triggers

Appointment Object Fields Configuration
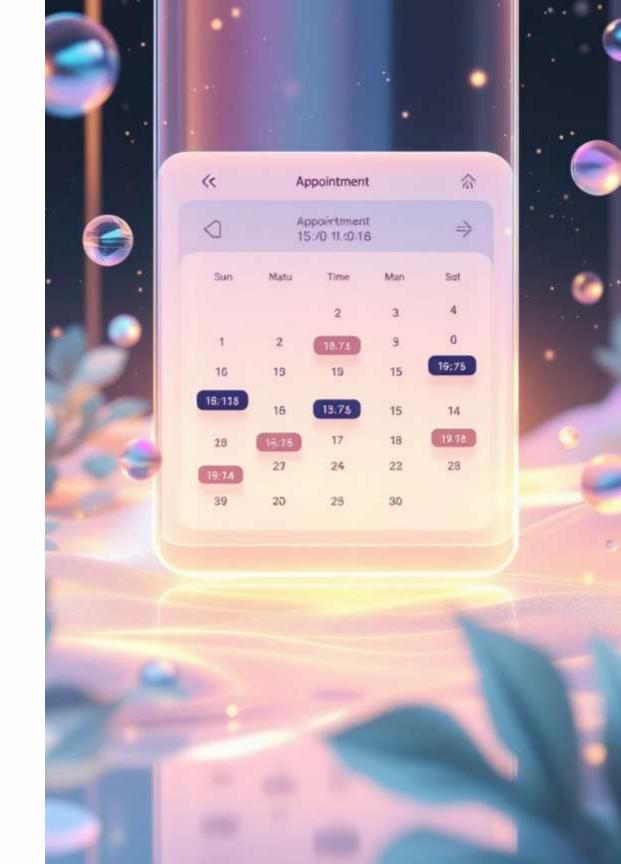
Fields Created on Appointment Object:

Navigated to Setup > Object Manager > Appointment > Fields & Relationships.

Status Field

Picklist field with values: Scheduled, Completed, Cancelled.

Appointment Date & Time

Date/Time field for scheduling appointments.

Setup | Home | Object Manager ▾

Search Setup

- 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
- Triggers
- Flow Triggers

Fields & Relationships
12 Items, Sorted by Field Label

Quick Find | New | Deleted Fields | Field Dependencies | Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED	
Appointment Date & Time	Appointment_Date_Time__c	Date/Time			▾
Appointment Name	Name	Auto Number		✓	▾
Client	Client__c	Lookup(Contact)		✓	▾
Created By	CreatedById	Lookup(User)			
Discount	Discount__c	Percent(2, 0)			▾
End Time	End_Time__c	Formula (Date/Time)			▾
Last Modified By	LastModifiedById	Lookup(User)			
Owner	OwnerId	Lookup(User,Group)		✓	
Price	Price__c	Formula (Currency)			▾
Service	Service__c	Lookup(Service)		✓	▾
Status	Status__c	Picklist			▾
Stylist	Stylist__c	Lookup(User)		✓	▾

Lookup vs Master-Detail vs Hierarchical Relationships

Action Taken: Lookup Relationships were used to connect the Appointment object to other objects. This was chosen over Master-Detail to maintain historical appointment data even if a related record (like a Contact) is deleted.

Relationships Created on Appointment Object

1

Client Relationship

A required Lookup Relationship to the Contact object, named Client.

2

Service Relationship

A required Lookup Relationship to the Service object, named Service.

3

Stylist Relationship

A required Lookup Relationship to the User object, named Stylist.

Page Layouts Customization

Action Taken:

The default page layout for the Appointment object was customized for better usability.

Navigation: Setup > Object Manager > Appointment > Page Layouts.

Steps:

1. Clicked Edit on the "Appointment Layout".

2. Dragged and dropped fields to place the most important information (Client, Stylist, Service, Appointment Date & Time) at the top of the page.

3. Removed unnecessary fields (like the standard Owner field) from the layout.

Appointment

Save ▾ | Quick Save | Preview As... ▾ | Cancel | ↶ Undo | ↷ Redo | ▦ Layout Properties

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

Triggers

Flow Triggers

🔍 **Quick Find** | Field Name | ✕

Fields
Buttons
Quick Actions
Mobile & Lightning Actions
Expanded Lookups
Related Lists
Report Charts

⊞ Section	Client	Last Modified By	Status
⊞ Blank Space	Created By	Owner	Stylist
Appointment Date ...	Discount	Price	
Appointment Name	End Time	Service	

Appointment Detail
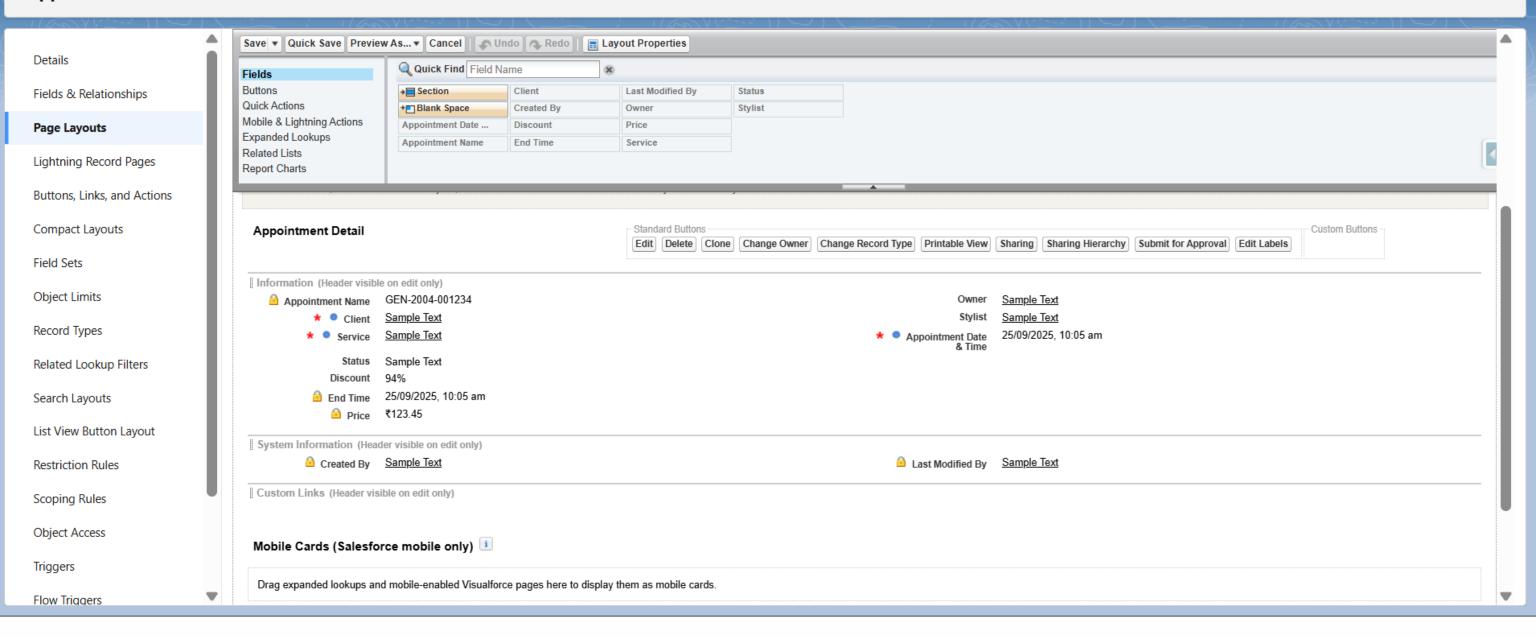
Standard Buttons

Edit | Delete | Clone | Change Owner | Change Record Type | Printable View | Sharing | Sharing Hierarchy | Submit for Approval | Edit Labels

Custom Buttons

▌**Information** (Header visible on edit only)

🔒 Appointment Name   GEN-2004-001234   Owner   Sample Text

★ 🔵 Client   Sample Text   Stylist   Sample Text

★ 🔵 Service   Sample Text   ★ 🔵 Appointment Date   25/09/2025, 10:05 am
                & Time

Status   Sample Text

Discount   94%

🔒 End Time   25/09/2025, 10:05 am

🔒 Price   ₹123.45

▌**System Information** (Header visible on edit only)

🔒 Created By   Sample Text   🔒 Last Modified By   Sample Text

▌**Custom Links** (Header visible on edit only)

Mobile Cards (Salesforce mobile only) ℹ️

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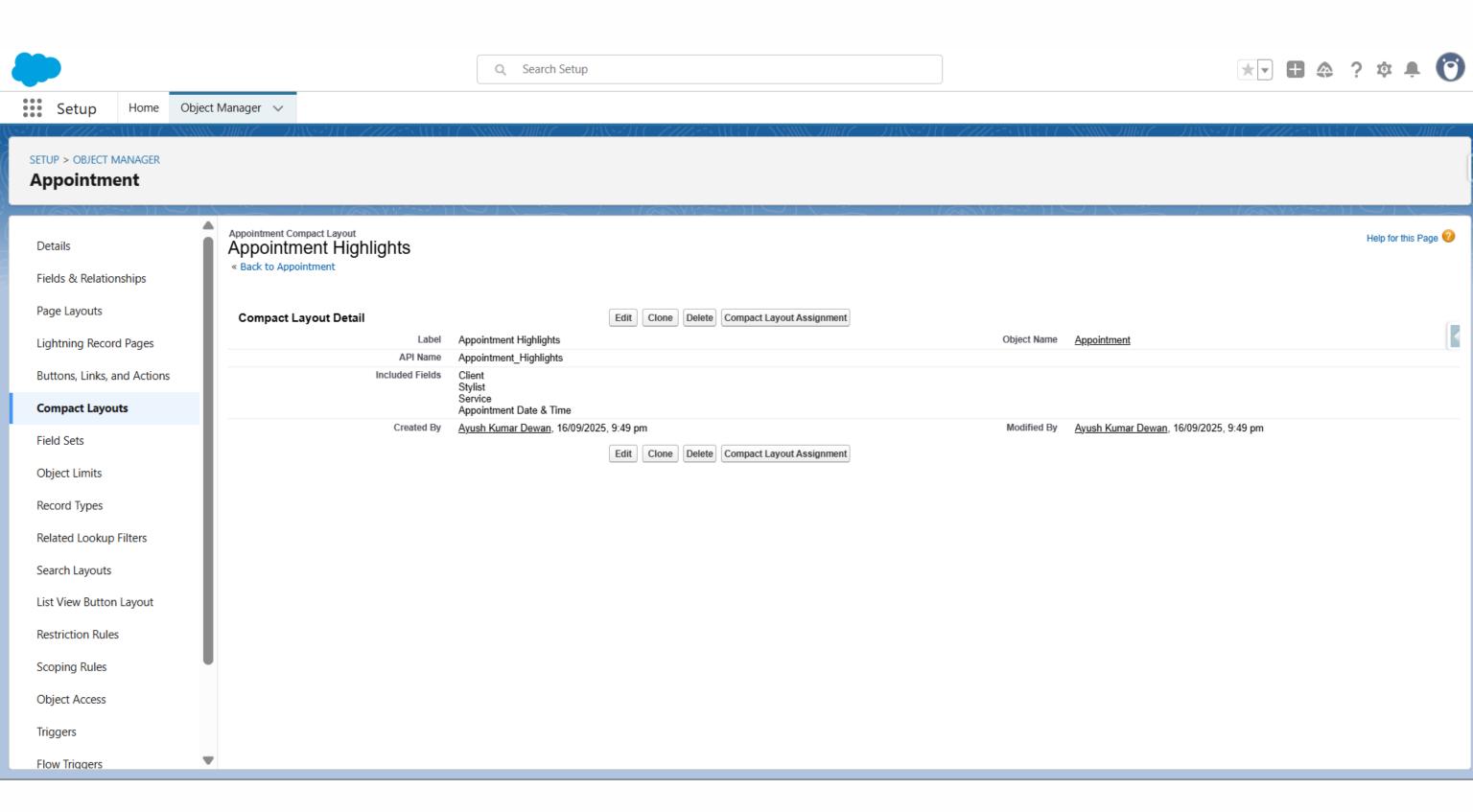
Compact Layouts Configuration

Action Taken: A custom compact layout was created to control the "at-a-glance" summary for appointments.

Navigation: Setup > Object Manager > Appointment > Compact Layouts.

01

Create New Layout

Clicked New to create a layout named Appointment Highlights.

02

Add Fields

Added the Client, Stylist, Service, and Appointment Date & Time fields to the layout.

03

Set as Primary

Used the Compact Layout Assignment button to set this new layout as the primary one for the object.

Setup | Home | Object Manager ⌄

Appointment

Details

Fields & Relationships

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Flow Triggers

Appointment Compact Layout
Appointment Highlights
« Back to Appointment

Help for this Page ❓

Compact Layout Detail

[Edit] [Clone] [Delete] [Compact Layout Assignment]

Label	Appointment Highlights	Object Name	**Appointment**
API Name	Appointment_Highlights		
Included Fields	Client Stylist Service Appointment Date & Time		
Created By	Ayush Kumar Dewan, 16/09/2025, 9:49 pm	Modified By	Ayush Kumar Dewan, 16/09/2025, 9:49 pm

[Edit] [Clone] [Delete] [Compact Layout Assignment]

Schema Builder Verification

Action Taken: The Schema Builder was used as a final verification tool to visualize the entire data model.

Navigation: Setup > Schema Builder.

Steps:

1. Cleared the canvas of all default objects.

2. Selected the Contact, User, Service, and Appointment objects.

3. Used the Auto-Layout feature to generate a clear diagram, confirming that all relationships were correctly established with the Appointment object at the center.