

Guest360 CRM Project – Phase 3: Data Modeling & Relationships

This document explains Phase 3 (Data Modeling & Relationships) of the Guest360 CRM Project. It includes detailed step-by-step instructions, navigation paths for taking screenshots, and ready-to-use content.

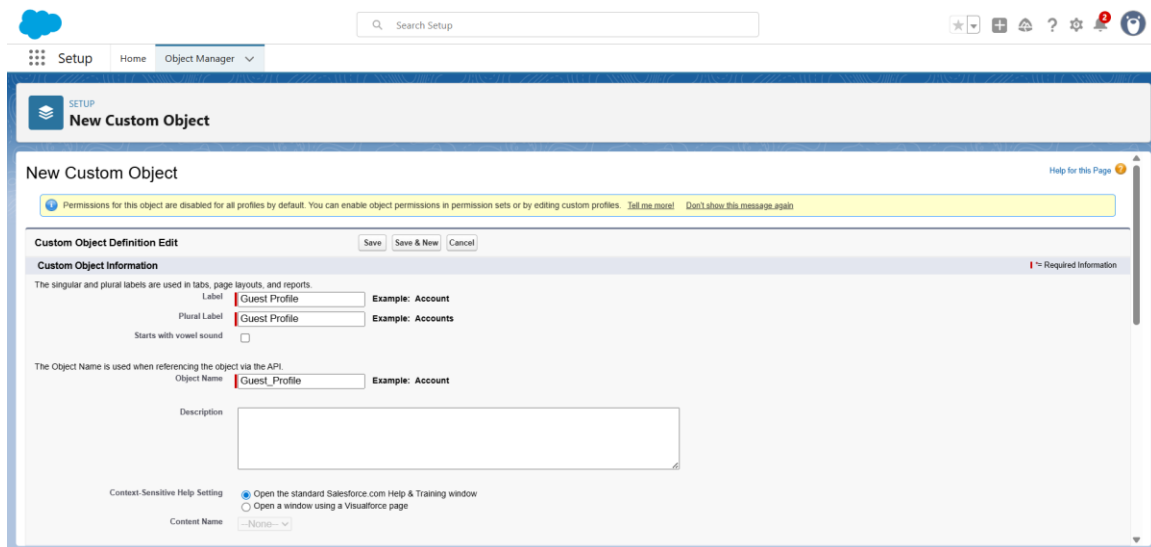
Step 1: Create Custom Objects

Path: **Setup** → **Object Manager** → **Create** → **Custom Object**

Objects to create:

- Guest Profile
- Reservation
- Preferences
- Feedback

Each object should allow Reports and Activities.



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 banner at the top of the main content area 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 titled 'Custom Object Definition Edit' and includes a 'Custom Object Information' tab. This tab contains several input fields: 'Label' (with a red border and 'Guest Profile' entered, example 'Account'), 'Plural Label' (with a red border and 'Guest Profiles' entered, example 'Accounts'), 'Object Name' (with a red border and 'Guest_Profile' entered, example 'Account'), and a 'Description' text area. There are also checkboxes for 'Starts with vowel sound' and 'Context-Sensitive Help Setting'.

Step 2: Add Custom Fields

Path: **Object Manager** → **[Object]** → **Fields & Relationships** → **New**

Fields for Reservation:

- Booking Date (Date)
- Hotel/Airline (Picklist: Hotel, Airline)
- Amount (Currency)

Fields for Preferences:

- Room Type (Picklist: Standard, Deluxe, Suite, Economy, Business, First Class)
- Meal Choice (Picklist: Veg, Non-Veg, Vegan, Gluten-Free)
- Special Requests (Text Area Long)

Fields for Feedback:

- Rating (Number 1-5)
- Comments (Text Area Long)
- Submitted Date (Date/Time)

The screenshot shows the Salesforce Setup interface for defining a custom field. The breadcrumb trail is **Setup > OBJECT MANAGER**. The page title is **Reservation**. The left sidebar shows the **Fields & Relationships** section expanded, with sub-items like 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 **Reservation Custom Field Booking Date** with a [Back to Reservation](#) link. Below the title are tabs for **Validation Rules III**, **Custom Field Definition Detail** (selected), **Edit**, **Set Field-Level Security**, **View Field Accessibility**, and **Where is this used?**. The **Field Information** section contains a table with the following data:

Field Label	Booking Date	Object Name	Reservation
Field Name	Booking_Date	Data Type	Date
API Name	Booking_Date__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Siddhi Jogale, 9/20/2025, 6:23 AM	Modified By	Siddhi Jogale, 9/20/2025, 6:23 AM

The **General Options** section shows **Required** as an unchecked checkbox and **Default Value** as an empty text field. The **Validation Rules** section has a **New** button and a message: **No validation rules defined.** A [Validation Rules Help](#) link is also present.

Step 3: Record Types

Path: **Object Manager → Guest Profile → Record Types → New**

Create record types:

- Hotel Guest
- Airline Passenger

Guest Profile

Step 1. Enter the details (Step 1 of 2)

Enter a name and description for the new record type. The new record type will include all the picklist values from the existing record type selected below. After saving the new record type, you will be able to customize the picklist values.

Record Type * Required Information

Existing Record Type: **--Master--**

Record Type Label: **Hotel Guest**

Record Type Name: **Hotel_Guest**

Description:

Active: ☐

Select Make Available to give users assigned to this profile the ability to create and clone records of this record type, or assign this record type to existing records. To make the new record type the default for a profile, select Make Default. Users assigned to this record type can still view and edit records associated with record types not available for their profiles.

Profile Name	Record Types Currently Available	<input type="checkbox"/> Make Available	<input type="checkbox"/> Make Default
Analytics Cloud Integration User	Airline Passenger (Default)	<input type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	Airline Passenger (Default)	<input type="checkbox"/>	<input type="checkbox"/>

Step 4: Define Relationships

Path: **Object Manager** → **[Object]** → **Fields & Relationships** → **New** → **Lookup Relationship**

Relationships to create:

- Reservation → Guest Profile (Lookup)
- Preferences → Guest Profile (Lookup)
- Feedback → Guest Profile (Lookup)
- Feedback → Reservation (Lookup)

Reservation

New Relationship

Step 3. Enter the label and name for the lookup field (Step 2 of 6)

Field Label: **Guest**

Field Name: **Guest**

Description:

Help Text:

Child Relationship Name: **Reservations3**

Required: ☐ Always require a value in this field in order to save a record.

What to do if the lookup record is deleted?

☒ Clear the value of this field. You can't choose this option if you make this field required.

☐ Don't allow deletion of the lookup record that's part of a lookup relationship.

Auto add to custom report type: ☒ Add this field to existing custom report types that contain this entity.

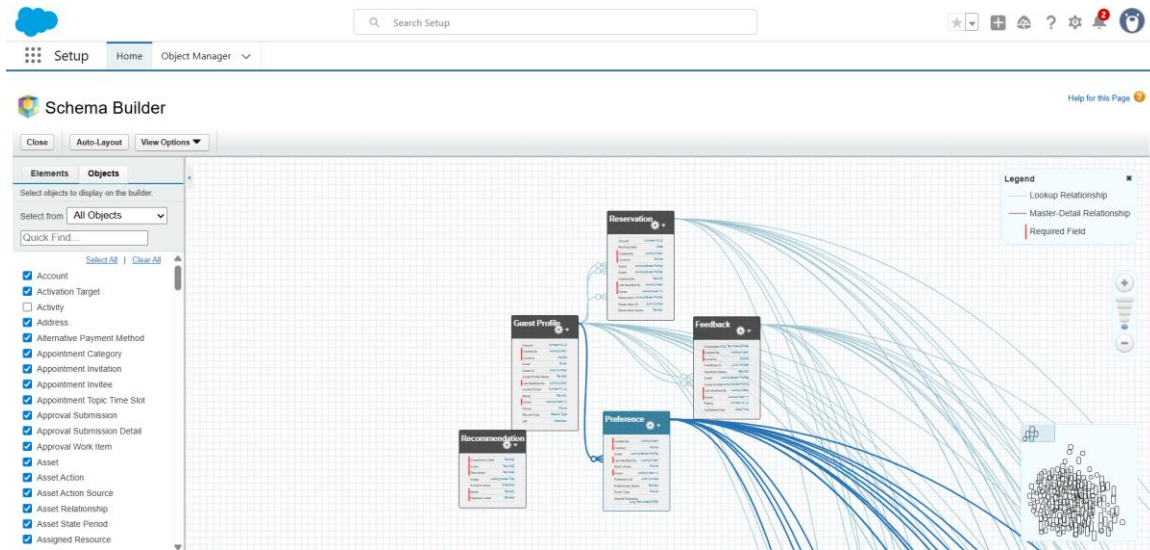
Step 5: Schema Builder Visualization

Path: **Setup** → **Quick Find** → **Schema Builder**

Steps:

1. Select objects (Guest Profile, Reservation, Preferences, Feedback).

2. Arrange Guest Profile in the center.
3. Drag related objects around Guest Profile.
4. Confirm relationship lines are visible.



Step 6: External Objects (Optional)

Path: Setup → External Data Sources → New External Data Source

Steps:

1. Define Data Source (e.g., OData 4.0 endpoint for Hotel Reservations).
2. Click Validate and Sync.
3. Select the table (e.g., Reservations) and sync.
4. Salesforce creates an External Object (e.g., External Reservations).

The screenshot shows the 'New External Data Source' form in the Salesforce Setup interface. The form includes fields for 'External Data Source', 'Name', and 'Type'. The 'Authentication' section shows 'Identity Type' set to 'Anonymous' and 'Authentication Protocol' set to 'No Authentication'. Buttons for 'Save', 'Save and New', and 'Cancel' are visible.

Conclusion

Phase 3 completes the Data Modeling & Relationships for Guest360 CRM. Custom Objects, Fields, Record Types, Relationships, and External Objects are defined. Schema Builder is used to visualize the entire data model for clarity.