

Phase 3 – Data Modeling & Relationships (Step-by-Step)

#. Create Custom Objects

- Go to Setup → Object Manager → Create → Custom Object
- Create:
 - Reservation__c → for bookings
 - Customer__c → for customer profiles
 - Staff__c → for employees
 - Bill__c → for payments
- Check Allow Reports, Allow Activities, Track Field History
- Save → Choose Tab Icon (e.g., 🏠 for Reservation, 🧑 for Customer, 💳 for Bill).

#. Add Custom Fields

Reservation__c

- Table Number (Number)
- Date (Date)
- Time (Time)
- Guests (Number)
- Status (Picklist: Confirmed, Pending, Cancelled, Missed)
- Lookup → Customer__c
- Lookup → Staff__c

Customer__c

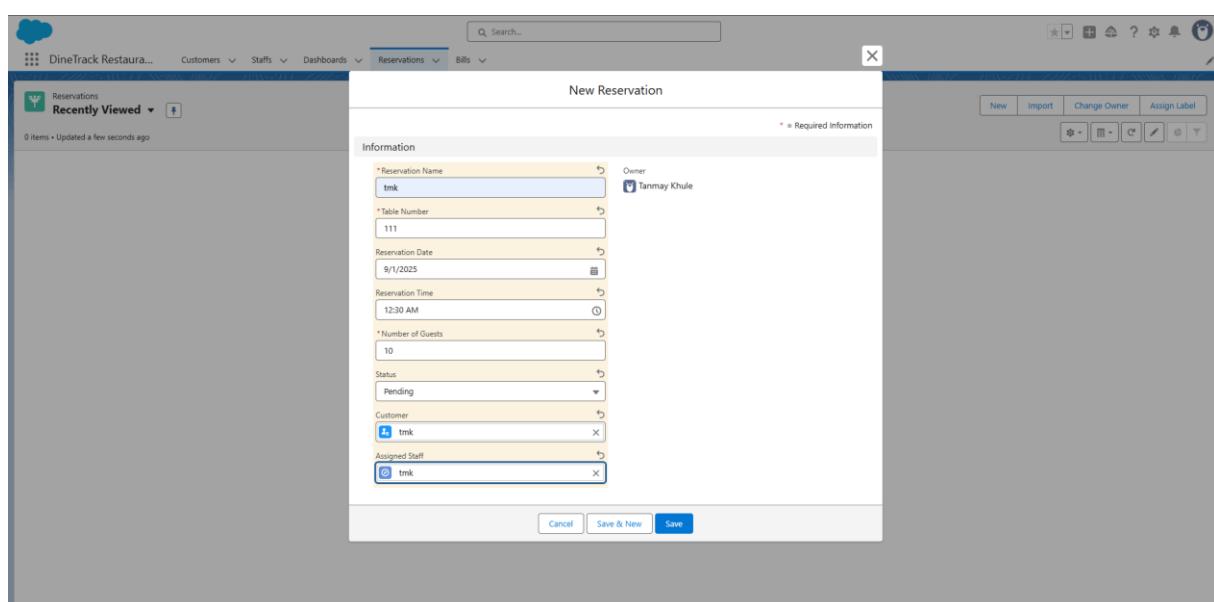
- Contact Number (Phone)
- Email (Email)
- Preferences (Text Area)
- Allergies (Text)
- Visit History (Long Text Area)

Staff__c

- Role (Picklist: Waiter, Chef, Manager)
- Shift Timings (Text)
- Assigned Tables (Text/Number)

Bill__c

- Amount (Currency)
- Payment Status (Picklist: Paid, Pending, Cancelled)
- Order Details (Text Area)
- Master-Detail → Reservation__c



DineTrack Restaurant Management System

Customers Recently Viewed

0 items • Updated a minute ago

New Customer

Information

* = Required information

Party	Name
Tanmay Khule	tmk
Customer Status Type	Total Life Time Value
Active	1

Cancel Save & New Save

There's nothing in your list yet! Try adding a new record.

DineTrack Restaurant Management System

Customers Staffs Dashboards Reservations Bills

Recently Viewed

0 items • Updated a few seconds ago

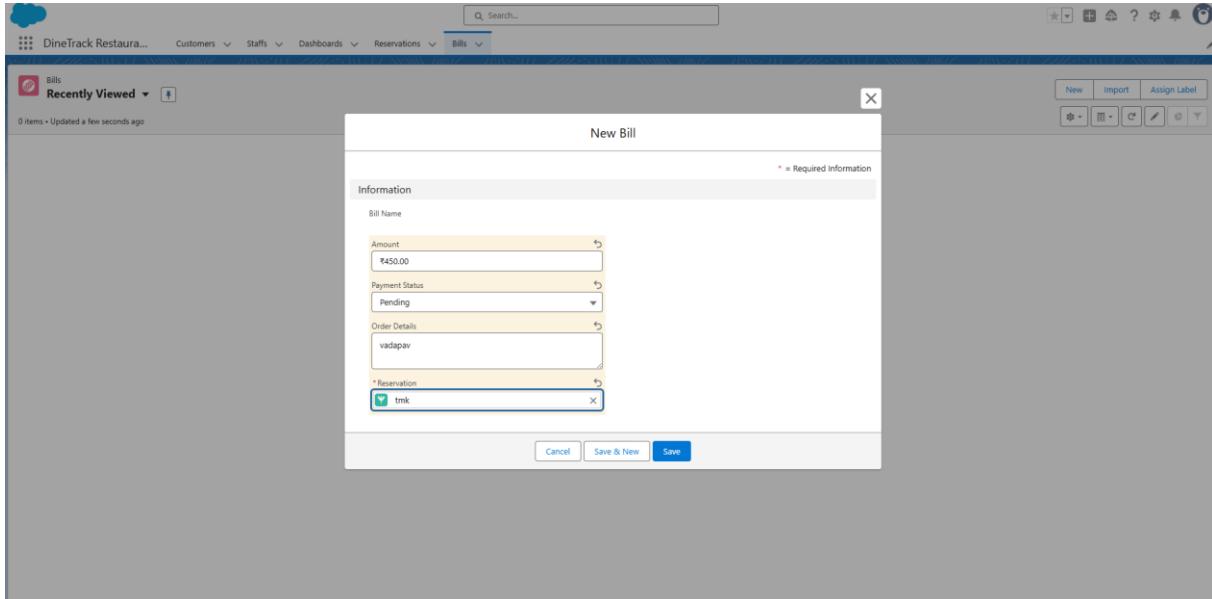
New Staff

Information

* = Required information

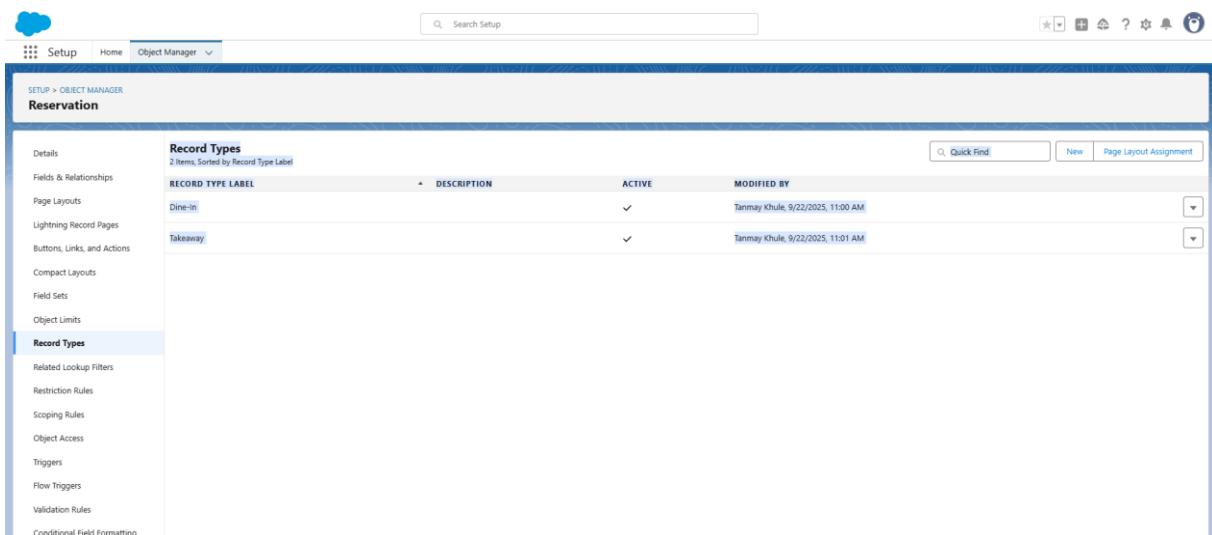
Staff Name	Owner
tmk	Tanmay Khule
Role	
Manager	
Shift Timings	
10am-10pm	
Assigned Tables	

Cancel Save & New Save



3. Record Types & Layouts

- Go to Object Manager → Reservation → Record Types → New
 - Record Types: Dine-In, Takeaway
- Page Layouts:
 - Reservation → Show Customer, Table No., Status on top
 - Customer → Contact Info + Preferences + Allergies
 - Staff → Role + Shift Timings
 - Bill → Amount + Payment Status prominently
- Compact Layouts (for mobile):
 - Reservation → [Customer, Date, Time, Status]
 - Customer → [Name, Contact No., Preferences]
 - Bill → [Amount, Status, Reservation]



SETUP > OBJECT MANAGER Reservation

Reservation Layout

Save • Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields

- Buttons
- Quick Find
- Section
- Blank Space
- Last Modified By
- Record Type
- Status
- Assigned Staff
- Number of Guests
- Reservation Name
- Created By
- Owner
- Reservation Time

Reservation Sample

Customize the highlights panel for this page layout.

Highlights Panel

Configure the highlights panel for this page layout.

Quick Actions in the Salesforce Classic Publisher

Actions in this section are currently inherited from the global publisher layout. You can override the global publisher layout to set a customized list of actions for the publisher on pages that use this layout.

Salesforce Mobile and Lightning Experience Actions

Actions in this section are predefined by Salesforce. You can override the predefined actions to set a customized list of actions on Lightning Experience and mobile app pages that use this layout. If you customize the actions in the Quick Actions in the Salesforce Classic Publisher section, and have saved the layout, then this section inherits that set of actions by default when you click to override.

Reservation Detail

Standard Buttons: Edit, Delete, Clone, Change Owner, Change Record Type, Printable View, Sharing, Sharing Hierarchy, Edit Labels, Custom Buttons.

Information (Header visible on edit only)

SETUP > OBJECT MANAGER Reservation

Compact Layouts

2 items, Sorted by Label

LABEL	API NAME	PRIMARY	MODIFIED BY	LAST MODIFIED
Reservation_Compact_Layout	Reservation_Compact_Layout		Tanmay Khule	9/22/2025, 11:30 AM
System Default	SYSTEM			

New Compact Layout Assignment

SETUP > OBJECT MANAGER Customer

Compact Layouts

2 items, Sorted by Label

LABEL	API NAME	PRIMARY	MODIFIED BY	LAST MODIFIED
Customer_Compact_Layout	Customer_Compact_Layout		Tanmay Khule	9/22/2025, 11:32 AM
System Default	SYSTEM			

New Compact Layout Assignment

SETUP > OBJECT MANAGER
Bill

Compact Layouts		2 Item, Sorted by Label			
LABEL	API NAME	PRIMARY	MODIFIED BY	LAST MODIFIED	
Bill_Compact_Layout	Bill_Compact_Layout		Tanmay Khule	9/22/2025, 11:33 AM	<input type="button" value="New"/>
System Default	SYSTEM	<input checked="" type="checkbox"/>			<input type="button" value="Compact Layout Assignment"/>

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

#. Schema Builder Visualization

- Setup → Quick Find → Schema Builder
- Select objects: Customer, Reservation, Staff, Bill
- Drag them on canvas → See relationships:
 - Customer ↔ Reservation ↔ Bill
 - Staff ↔ Reservation

