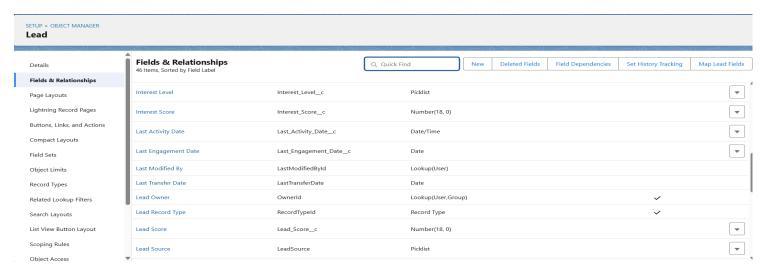
# Phase 3 – Data Modeling & Relationships

### 1. Standard & Custom Objects

- Standard Object Used:
  - Lead → Captures customer inquiries and scoring.
- Custom Objects Created:
  - Lead Engagement → Stores engagement metrics (email clicks, property visits, responses).

#### 2. Fields

- Lead Object Custom Fields:
  - Interest\_Score\_\_c(Number) → Captures interest score.
  - Lead\_Score\_c (Number) → Capture lead score
  - Interest Level c (Picklist) → Choose level(high,medium,low)
  - LeadSource (Picklist) → Choose type of source



#### Lead Engagement Object Custom Fields:

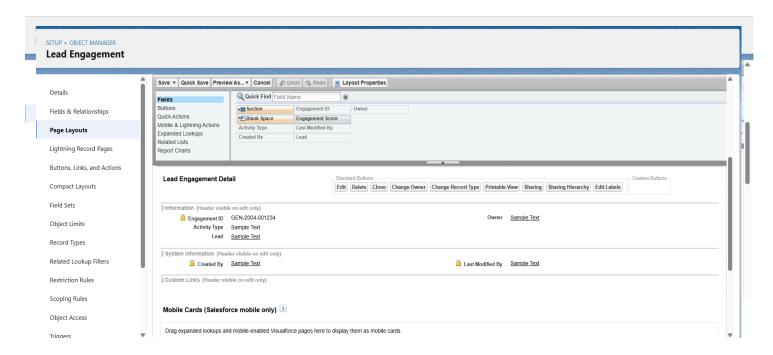
- Engagement\_Score\_\_c(Number) → Engagement tracking.
- Lead c(Lookup to Lead) → Relationship with Lead.

## 3. Record Types

Not required in this project (since only one lead process is defined).

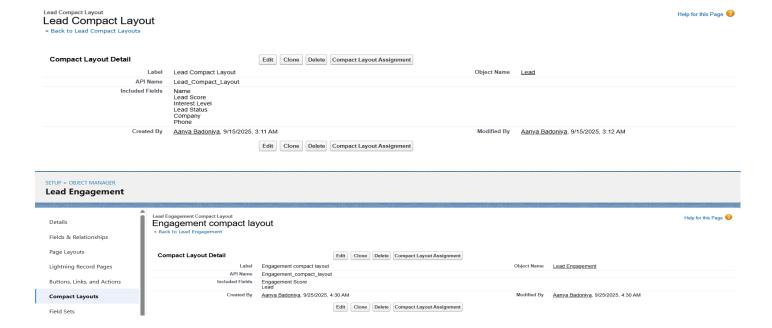
### 4. Page Layouts

- Lead Layout:
  - Added Interest Score, Lead Score, related list of Lead Engagement.
- Lead Engagement Layout:
  - Engagement Score, related Lead field.



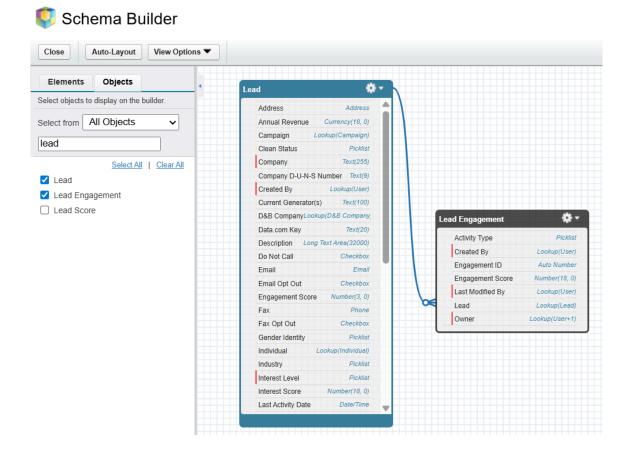
## 5. Compact Layouts

- For **Lead**, included key fields: Name, Status, Phone, Lead Score.
- For Lead Engagement, included Engagement Score and Related Lead.



#### 6. Schema Builder

- Used Schema Builder to visualize the relationship:
  - Lead ↔ Lead Engagement (Lookup).



## 7. Relationships

## • Lookup Relationship:

- $\circ$  Lead Engagement  $\rightarrow$  Lookup to  $\rightarrow$  Lead.
- o This allows storing multiple engagement records for a single lead.

# 8. Junction Objects

• Not required in this project (only one-to-many relationship).

### 9. External Objects

• Not required, since no external system integration in Phase 3.