

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

SETUP > OBJECT MANAGER				
Lead				
Details	Fields & Relationships 46 Items, Sorted by Field Label			
Fields & Relationships	<div>Q Quick Find</div> <div>NewDeleted FieldsField DependenciesSet History TrackingMap Lead Fields</div>			
Page Layouts	Interest Level	Interest_Level__c	Picklist	▼
Lightning Record Pages	Interest Score	Interest_Score__c	Number(18, 0)	▼
Buttons, Links, and Actions	Last Activity Date	Last_Activity_Date__c	Date/Time	▼
Compact Layouts	Last Engagement Date	Last_Engagement_Date__c	Date	▼
Field Sets	Last Modified By	LastModifiedById	Lookup(User)	
Object Limits	Last Transfer Date	LastTransferDate	Date	
Record Types	Lead Owner	OwnerId	Lookup(User,Group)	✓
Related Lookup Filters	Lead Record Type	RecordTypeId	Record Type	✓
Search Layouts	Lead Score	Lead_Score__c	Number(18, 0)	▼
List View Button Layout	Lead Source	LeadSource	Picklist	▼
Scoping Rules				
Object Access				

- **Lead Engagement Object Custom Fields:**
 - Engagement_Score__c(Number) → Engagement tracking.
 - Lead__c(Lookup to Lead) → Relationship with Lead.

SETUP > OBJECT MANAGER				
Lead Engagement				
Details	Fields & Relationships 7 Items, Sorted by Field Label			
Fields & Relationships	<div>Q Quick Find</div> <div>NewDeleted FieldsField DependenciesSet History Tracking</div>			
Page Layouts	Activity Type	Activity_Type__c	Picklist	▼

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.

The screenshot shows the Salesforce Setup interface for configuring the 'Lead Engagement' page layout. The left sidebar contains a navigation menu with options: 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 'Lead Engagement' and includes a 'Fields' section on the left with a 'Quick Find' bar. The 'Fields' section lists various field types: Section, Blank Space, Activity Type, and Created By. The main area displays the 'Lead Engagement Detail' layout, which includes a 'Standard Buttons' section with buttons like Edit, Delete, Clone, Change Owner, Change Record Type, Printable View, Sharing, Sharing Hierarchy, and Edit Labels. Below this, there are sections for 'Information' (Header visible on edit only), 'System Information' (Header visible on edit only), and 'Custom Links' (Header visible on edit only). The 'Information' section shows fields like Engagement ID (GEN-2004-001234), Activity Type (Sample Text), and Lead (Sample Text). The 'System Information' section shows fields like Created By (Sample Text) and Last Modified By (Sample Text). The 'Custom Links' section is currently empty. At the bottom, there is a section for 'Mobile Cards (Salesforce mobile only)' with a note: 'Drag expanded lookups and mobile-enabled Visualforce pages here to display them as mobile cards.'

5. Compact Layouts

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

Lead Compact Layout
Lead Compact Layout
« Back to Lead Compact Layouts

Help for this Page

Compact Layout Detail

Edit Clone Delete Compact Layout Assignment

Label	Lead Compact Layout	Object Name	Lead
API Name	Lead_Compact_Layout		
Included Fields	Name Lead Score Interest Level Lead Status Company Phone		
Created By	Aanya Badoniya, 9/15/2025, 3:11 AM	Modified By	Aanya Badoniya, 9/15/2025, 3:12 AM

Edit Clone Delete Compact Layout Assignment

SETUP > OBJECT MANAGER

Lead Engagement

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets

Lead Engagement Compact Layout
Engagement compact layout
« Back to Lead Engagement

Help for this Page

Compact Layout Detail

Edit Clone Delete Compact Layout Assignment

Label	Engagement compact layout	Object Name	Lead Engagement
API Name	Engagement_compact_layout		
Included Fields	Engagement Score Lead		
Created By	Aanya Badoniya, 9/25/2025, 4:30 AM	Modified By	Aanya Badoniya, 9/25/2025, 4:30 AM

Edit Clone Delete Compact Layout Assignment

6. Schema Builder

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

Schema Builder

Close Auto-Layout View Options

Elements Objects

Select objects to display on the builder.

Select from All Objects

lead

Select All Clear All

☒ Lead
☒ Lead Engagement
☐ Lead Score

Lead

- Address Address
- Annual Revenue Currency(18, 0)
- Campaign Lookup(Campaign)
- Clean Status Picklist
- Company Text(255)
- Company D-U-N-S Number Text(9)
- Created By Lookup(User)
- Current Generator(s) Text(100)
- D&B CompanyLookup(D&B Company,
- Data.com Key Text(20)
- Description Long Text Area(32000)
- Do Not Call Checkbox
- Email Email
- Email Opt Out Checkbox
- Engagement Score Number(3, 0)
- Fax Phone
- Fax Opt Out Checkbox
- Gender Identity Picklist
- Individual Lookup(Individual)
- Industry Picklist
- Interest Level Picklist
- Interest Score Number(18, 0)
- Last Activity Date Date/Time

Lead Engagement

- Activity Type Picklist
- Created By Lookup(User)
- Engagement ID Auto Number
- Engagement Score Number(18, 0)
- Last Modified By Lookup(User)
- Lead Lookup(Lead)
- Owner Lookup(User+1)

7. Relationships

- **Lookup Relationship:**

- Lead Engagement → Lookup to → Lead.
- 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.