

# Phase 3: Data Modeling & Relationships – Revaa

## 1. Introduction

Phase 3 focuses on **defining the Salesforce data model** for the Revaa platform. This includes creation of **custom objects, fields, relationships, page layouts, record types, compact layouts, and junction objects**. Proper data modeling ensures the application can **track investors, properties, investments, lots, and profit distributions** in a scalable and maintainable way.

## 2. Standard & Custom Objects

The following **custom objects** were created:

Object Name	API Name	Purpose
Property	Property__c	Stores details of real estate properties (name, location, value, total & available lots, ROI)
Investor	Investor__c	Stores investor information (name, email, phone, total investment, portfolio value)
Investment Transaction	InvestmentTransaction__c	Acts as a junction object linking Investor → Property. Tracks lots purchased, investment amount, ownership %.
Profit Distribution	ProfitDistribution__c	Tracks profit distributions for each investor per property.
Investment Lot	InvestmentLot__c	Tracks individual lots per property and their allocation to investors.

SETUP  
Object Manager  
52+ Items. Sorted by Last Modified

[Schema Builder](#)[Create](#)

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Profit Distribution	Profit_Distribution__c	Custom Object		9/26/2025	✓
Investment Lot	Investment_Lot__c	Custom Object		9/20/2025	✓
Transaction	Transaction__c	Custom Object		9/20/2025	✓
Investor	Investor__c	Custom Object	Purpose: Represents people investing in properties.	9/20/2025	✓
Property	Property__c	Custom Object	Real estate property available for investment	9/20/2025	✓
Work Type Group Member	WorkTypeGroupMember	Standard Object			
Work Type Group	WorkTypeGroup	Standard Object			
Work Type	WorkType	Standard Object			

### 3. Fields

#### Property\_\_c

- Property Name (Text) – Record Name
- Location (Text)
- Total Value (Currency)
- Total Lots (Number)
- Available Lots (Number, auto-updated by Flow)
- ROI % (Percent)

#### Investor\_\_c

- Investor Name (Text) – Record Name
- Email (Email)
- Phone (Phone)
- Total Investment (Currency – Roll-up Summary)
- Portfolio Value (Currency – Formula)

#### InvestmentTransaction\_\_c

- Transaction Number (Auto Number, e.g., TX-{0001}) – Record Name
- Investor (Lookup → Investor\_\_c)
- Property (Lookup → Property\_\_c)
- Lots Purchased (Number)
- Investment Amount (Currency, formula:  $\text{Lots\_Purchased\_c} * (\text{Property\_r.Total\_Value\_c} / \text{Property\_r.Total\_Lots\_c})$ )
- Ownership % (Formula:  $(\text{Lots\_Purchased\_c} / \text{Property\_r.Total\_Lots\_c}) * 100$ )

#### ProfitDistribution\_\_c

- Profit Distribution ID (Auto Number) – Record Name
- Property (Lookup → Property\_\_c)
- Investor (Lookup → Investor\_\_c)
- Profit Amount (Currency)
- Distribution Date (Date)

#### InvestmentLot\_\_c

- Lot Name (Text/Auto Number) – Record Name
- Property (Lookup → Property\_\_c)
- Investor (Lookup → Investor\_\_c)
- Lot Status (Picklist: Available, Allocated, Sold)
- Lot Value (Currency)
- Purchase Date (Date)

SETUP > OBJECT MANAGER

### Property

Details	<b>Fields &amp; Relationships</b> 13 Items, Sorted by Field Label					<input type="text" value="Q, Quick Find"/>	<a href="#">New</a> <a href="#">Deleted Fields</a> <a href="#">Field Dependencies</a> <a href="#">Set History Tracking</a>
<b>Fields &amp; Relationships</b>	<b>FIELD LABEL</b>	<b>FIELD NAME</b>	<b>DATA TYPE</b>	<b>CONTROLLING FIELD</b>	<b>INDEXED</b>		
Page Layouts	Available Lots	Available_Lots__c	Formula (Number)				
Lightning Record Pages	Created By	CreatedById	Lookup(User)				
Buttons, Links, and Actions	Currency	CurrencyIsoCode	Picklist				
Compact Layouts	Last Modified By	LastModifiedById	Lookup(User)				
Field Sets	Location	Location__c	Text(255)				
Object Limits	Owner	OwnerId	Lookup(User,Group)		✓		
Record Types	Price	Price__c	Currency(18, 0)				
Related Lookup Filters	Property Description	Property_Description__c	Long Text Area(32768)				
Restriction Rules	Property Name	Name	Text(80)		✓		
Scoping Rules	Record Type	RecordTypeId	Record Type		✓		
Object Access							
Triggers							

SETUP > OBJECT MANAGER

### Transaction

Details	<b>Fields &amp; Relationships</b> 14 Items, Sorted by Field Label					<input type="text" value="Q, Quick Find"/>	<a href="#">New</a> <a href="#">Deleted Fields</a> <a href="#">Field Dependencies</a> <a href="#">Set History Tracking</a>
<b>Fields &amp; Relationships</b>	<b>FIELD LABEL</b>	<b>FIELD NAME</b>	<b>DATA TYPE</b>	<b>CONTROLLING FIELD</b>	<b>INDEXED</b>		
Page Layouts	Amount	Amount__c	Currency(18, 0)				
Lightning Record Pages	Created By	CreatedById	Lookup(User)				
Buttons, Links, and Actions	Currency	CurrencyIsoCode	Picklist				
Compact Layouts	Investment Amount	Investment_Amount__c	Formula (Number)				
Field Sets	Investor	Investor__c	Master-Detail(Investor)		✓		
Object Limits	Investor Name	Investor_Name__c	Lookup(Investor)		✓		
Record Types	Last Modified By	LastModifiedById	Lookup(User)				
Related Lookup Filters	Lot	Lot__c	Lookup(Investment Lot)		✓		
Search Layouts	Lots Purchased	Lots_Purchased__c	Number(18, 0)				
List View Button Layout							
Restriction Rules							
Scoping Rules							

SETUP > OBJECT MANAGER

Investment Lot

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

Fields & Relationships

8 Items, Sorted by Field Label

Q, Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Currency	CurrencyIsoCode	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
Lot Number	Name	Auto Number		✓
Owned By	Owned_By__c	Lookup(Investor)		✓
Price per Lot	Price_per_Lot__c	Currency(18, 0)		
Property	Property__c	Master-Detail(Property)		✓
Status	Status__c	Picklist		

SETUP > OBJECT MANAGER

Investor

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

Fields & Relationships

11 Items, Sorted by Field Label

Q, Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address__c	Long Text Area(32768)		
Contact Number	Contact_Number__c	Phone		
Created By	CreatedById	Lookup(User)		
Currency	CurrencyIsoCode	Picklist		
Email	Email__c	Email (Unique)		✓
Investor Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name__c	Text(30)		
Owner	OwnerId	Lookup(User,Group)		✓
Portfolio Value	Portfolio_Value__c	Currency(18, 0)		

SETUP > OBJECT MANAGER

Profit Distribution

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

Fields & Relationships

9 Items, Sorted by Field Label

Q, Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

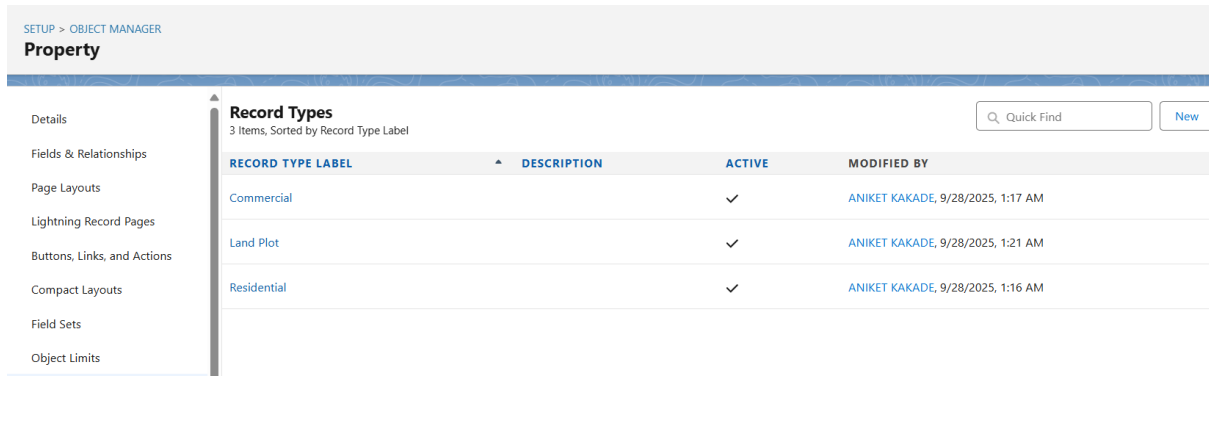
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Currency	CurrencyIsoCode	Picklist		
Distribution Date	Distribution_Date__c	Date		
Investor	Investor__c	Lookup(Investor)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Profit Amount	Profit_Amount__c	Currency(18, 0)		
Profit Distribution Name	Name	Text(80)		✓
Property	Property__c	Lookup(Property)		✓

MyASUS

## 4. Record Types

### Record Types Created for Property Object :

- Residential
- Commercial
- Land Plot



SETUP > OBJECT MANAGER

**Property**

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

**Record Types**  
3 Items, Sorted by Record Type Label

Q Quick Find [New](#)

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
Commercial		✓	ANIKET KAKADE, 9/28/2025, 1:17 AM
Land Plot		✓	ANIKET KAKADE, 9/28/2025, 1:21 AM
Residential		✓	ANIKET KAKADE, 9/28/2025, 1:16 AM

## 5. Page Layouts

- Each object has a **custom page layout** showing key fields.
- Related lists for junctions:
  - **Property** → Related List: Investment Transactions, Investment Lots, Profit Distributions
  - **Investor** → Related List: Investment Transactions, Investment Lots, Profit Distributions
  - **Investment Transaction** → Related List: (not needed)
  - **Profit Distribution** → Related List: (not needed)

## 6. Compact Layouts

### Fields for Highlights Panel (Lightning & Mobile):

Object	Compact Layout Name	Fields
Property__c	Property_Compact	Property Name, Location, Available Lots, ROI %
Investor__c	Investor_Compact	Investor Name, Total Investment, Portfolio Value, Email
InvestmentTransaction__c	InvestmentTransaction_Compact	Transaction Number, Investor, Property, Lots Purchased
ProfitDistribution__c	ProfitDistribution_Compact	Profit Distribution ID, Profit Amount, Distribution Date, Investor
InvestmentLot__c	InvestmentLot_Compact	Lot Name, Property, Investor, Lot Status

### Screenshot :

Compact Layout Detail

EditCloneDeleteCompact Layout Assignment

LabelProperty Compact

API NameProperty\_Compact

Included FieldsProperty Name  
Location  
Available Lots  
ROI %

Object NameProperty

Created ByANIKET KAKADE9/28/2025, 2:09 AM

Modified ByANIKET KAKADE9/28/2025, 2:09 AM

EditCloneDeleteCompact Layout Assignment

Investor Compact Layout

Investor Compact

[Help for this Page](#)

[Back to Investor](#)

Compact Layout Detail

EditCloneDeleteCompact Layout Assignment

LabelInvestor Compact

API NameInvestor\_Compact

Included FieldsInvestor Name  
Total Investment  
Portfolio Value  
Contact Number

Object NameInvestor

Created ByANIKET KAKADE9/28/2025, 2:10 AM

Modified ByANIKET KAKADE9/28/2025, 2:10 AM

EditCloneDeleteCompact Layout Assignment

Transaction Compact Layout  
**Transactions Compact**  
[« Back to Transaction](#)

**Compact Layout Detail**

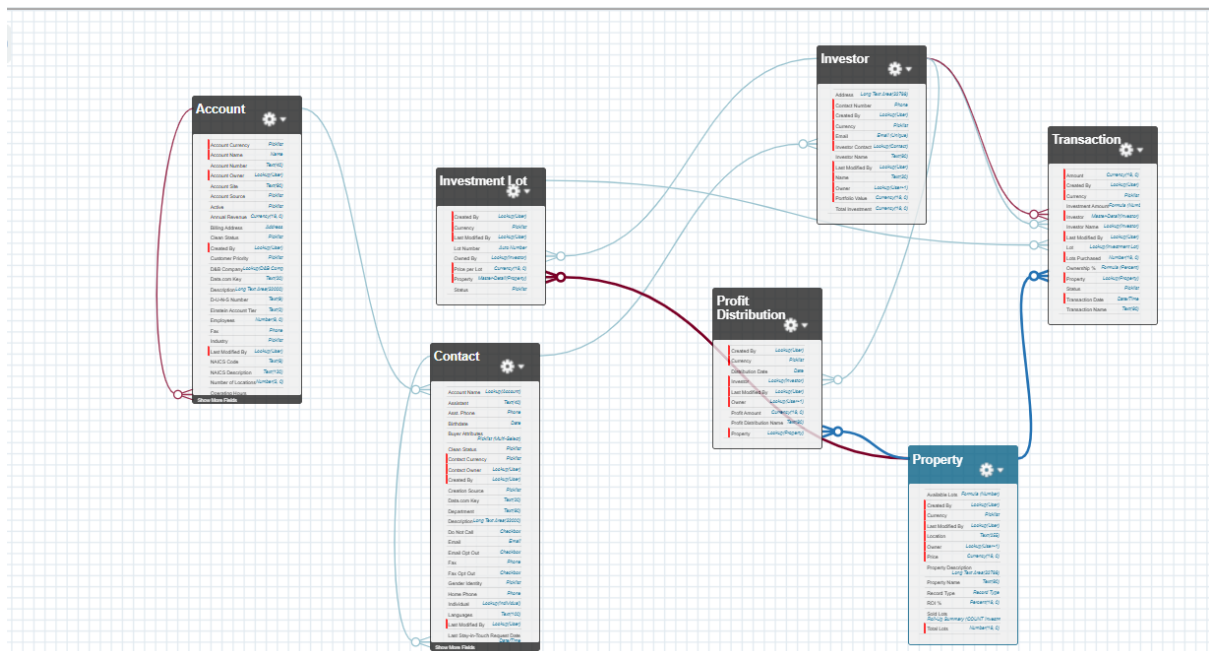
[Edit](#) [Clone](#) [Delete](#) [Compact Layout Assignment](#)

Label	Transactions Compact	Object Name	Transaction
API Name	Transactions_Compact		
Included Fields	Transaction Name Investor Property Lots Purchased		
Created By	ANIKET KAKADE, 9/28/2025, 2:12 AM	Modified By	ANIKET KAKADE, 9/28/2025, 2:12 AM

[Edit](#) [Clone](#) [Delete](#) [Compact Layout Assignment](#)

## 7. Schema Builder

- Used to **visually confirm relationships** and object fields.
- Objects included: Property, Investor, Investment Transaction, Profit Distribution, Investment Lot.
- Confirmed:
  - InvestmentTransaction\_\_c connects **Property\_\_c** ↔ **Investor\_\_c** (junction)
  - ProfitDistribution\_\_c links **Property\_\_c** ↔ **Investor\_\_c**
  - InvestmentLot\_\_c links **Property\_\_c** ↔ **Investor\_\_c**



## 8. Lookup vs Master-Detail vs Hierarchical Relationships

Relationship Type	Usage in Revaa	Notes
Lookup	InvestmentTransaction → Investor & Property	Flexible, can exist without parent
Master-Detail	Optional: convert InvestmentTransaction lookups to MD	Enforces parent-child data integrity, sharing inheritance
Hierarchical	Not used	Typically only for User object manager chains

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## 9. Junction Objects

- InvestmentTransaction\_\_c serves as **junction object** connecting Investor ↔ Property (many-to-many).
  - Optional: convert both lookup fields to Master-Detail for stricter Salesforce standard.
  - Related lists on Property & Investor pages allow easy navigation to all transactions.
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## 10. Verification Checklist

- All custom objects created with correct API names
  - Fields created with correct data types and formulas
  - Related lists added for junction objects
  - Compact layouts created and assigned
  - Schema Builder shows correct relationships
  - Ownership % formula verified:  $(\text{Lots\_Purchased\_c} / \text{Property\_r.Total\_Lots\_c}) * 100$
  - InvestmentTransaction\_\_c correctly functions as junction object
  - Screenshots captured for documentation
-