

Phase 3: Data Modeling & Relationships – Customer Success & Support CRM

Overview

In Phase 3, we designed and configured the **data model** of the Customer Success & Support Management CRM project. This includes defining objects, fields, record types, page layouts, compact layouts, schema builder verification, and relationships between objects.

1. Standard & Custom Objects

Standard Objects Used:

- Account
- Contact
- Case (Support Case)

Custom Objects Created:

- Onboarding Task
 - Usage Metric
 - Renewal Forecast
 - Account Product Usage (Junction Object)
-

2. Fields

Onboarding Task

- Task Name (Text)
- Status (Picklist: Not Started, In Progress, Completed, Follow-Up)
- Due Date (Date)
- Assigned To (Lookup → User)
- Related Account (Lookup → Account)

Setup > Object Manager

Onboarding Task

Fields & Relationships

	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
All_Perequisites_Completed__c	Assigned__c	Lookup(Users)		✓
Created By	CreatedById	Lookup(Users)		✓
Due Date	DueDate__t	Date		✓
Last Modified By	LastModifiedById	Lookup(Users)		✓
Onboarding_Task__Name	Name	Text(50)		✓
Owner	Owner	Lookup(Users)		✓
Priority	Priority__c	Priority		✓
Record Type	RecordType	Record Type		✓
Related Account	Related_Account__c	Lookup(Account)		✓
Status	Status__c	Profile		✓
Task Name	Task_Name__c	Text(50)		✓

Usage Metric

- Monthly Active Users (Number)
- API Calls Used (Number)
- Feature Adoption Score (Percent)
- Health Score (Formula)
- Related Account (Lookup → Account)

Setup > Object Manager

Usage Metric

Fields & Relationships

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Account	Account__c	Lookup(Account)		✓
Any Account	Any_Account__c	Master-Detail(Account)		✓
API Calls Used	API_Calls_Used__c	Number(0,0,0,0000)		✓
Created By	CreatedBy	Lookup(Users)		✓
Monthly Active Users	Monthly_Active_Users__c	Number(0,0)		✓
Feature Adoption Score	Feature_Adoption_Score__c	Percent(2)		✓
Health Score	Health_Score__c	Formula (Number)		✓
Health Score	Health_Score__c	Number(18,0)		✓
Last Modified By	LastModifiedById	Lookup(Users)		✓
Measurement Date	Measurement_Date__c	Date		✓
Metric Date	Metric_Date__c	Date		✓

Setup > Object Manager

Usage Metric

Fields & Relationships

	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Metric Date	Metric_Date__c	Date		✓
Metric Name	Metric_Name__c	Text(50)		✓
Metric Type	Metric_Type__c	Picklist		✓
Monthly Active Users	Monthly_Active_Users__c	Number(0,0,0,0000)		✓
Notes	Notes__c	Long Text Area(1000)		✓
Open Cases	open_Cases__c	Number(8,0)		✓
Record Type	RecordType	Record Type		✓
Related Account	Related_Account__c	Lookup(Account)		✓
Usage Metrics Name	Name	Text(50)		✓
Usage Percentage	Usage_Percentage__c	Number(5,2)		✓
Usage Period	Usage_Period__c	Picklist		✓
Usage Value	Usage_Value__c	Number(8,0)		✓

Renewal Forecast

- Renewal Date (Date)
- Renewal Status (Picklist: Pending, Renewed, Lost)
- Renewal Value (Currency)
- Related Account (Lookup → Account)

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		✓
Last Modified By	LastModifiedById	Lookup(User)		✓
Owner	OwnerId	Lookup(User User Group)		✓
Record Type	RecordTypeId	Record Type		✓
Related Account	Related_Account__c	Lookup(Account)		✓
Renewal Date	Renewal_Date__c	Date		✓
Renewal Forecast Name	Name	Text(80)		✓
Renewal status	Renewal_Status__c	Picklist		✓
Renewal Value	Renewal_Value__c	Currency(18,0)		✓

Case (Support Case)

- Case Type (Picklist: Customer Support, Technical Support)
- Escalation Level (Picklist: L1, L2, L3)
- Resolution Deadline (Date)
- Case Source (Picklist: Email, Phone, Portal, Chat)
- Customer Impact Score (Number)
- Related Account (Lookup → Account)
- Related Contact (Lookup → Contact)

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Account Name	AccountId	Lookup(Account)		✓
Asset	AssetId	Lookup(Asset)		✓
Business Hours	BusinessHourId	Lookup(Business Hour)		✓
Case Number	CaseNumber	Auto Number		✓
Case Origin	Origin	Picklist		✓
Case Owner	OwnerId	Lookup(User User Group)		✓
Case Reason	Reason	Picklist		✓
Case Record Type	RecordTypeId	Record Type		✓
Case Source	Case_Source__c	Picklist		✓
Case Source	SourceId	Lookup(Email Message,Messaging Session)		✓
Case Type	Case_Type__c	Picklist		✓
Closed When Created	IsClosedOnCreate	Checkbox		✓
Contact Email	ContactEmail	Email		✓

Account Product Usage (Junction Object)

- Account (Master-Detail → Account)
- Product (Master-Detail → Product)

- Monthly Active Users (Number)
- API Calls Used (Number)
- Feature Adoption Score (Percent)
- Health Score (Formula)

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Account	Account	Master-Detail (Account)		✓
API Calls Used	API_Calls_Used__c	Number (L.O.)		✓
Created By	CreatedBy	LookUpEdit		✓
Description	Description__c	Long Text Area (1000)		✓
Feature Adoption Score	Feature_Adoption_Score__c	Percent (L.O.)		✓
Health Score	Health_Score__c	Formula (Percent)		✓
Last Modified By	LastModifiedBy	LookUpEdit		✓
Monthly Active Users	Monthly_Active_Users__c	Number (L.O.)		✓
Product	Product	Master-Detail (Product)		✓
Product Category	Product_Category__c	Text		✓

3. Record Types

Onboarding Task

- **New Customer Task** → Picklist values: Not Started, In Progress, Completed
- **Existing Customer Task** → Picklist values: Not Started, In Progress, Follow-Up, Completed

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
Existing Customer Task		✓	Arish Ahuja, 22/09/2025, 5:19 pm
New Customer Task	"Tasks for onboarding new customers"	✓	Arish Ahuja, 22/09/2025, 5:16 pm

Usage Metric

- **API Usage** → focus fields: API Calls Used, Health Score
- **Product Usage** → focus fields: Monthly Active Users, Feature Adoption Score

The screenshot shows the Salesforce Setup interface under the Object Manager section. The left sidebar is collapsed. The main area displays a table titled 'Record Types' with two entries:

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
API Usage		✓	Anish Ahuja, 26/09/2025, 2:51 pm
Product Usage		✓	Anish Ahuja, 26/09/2025, 2:51 pm

Renewal Forecast

- **Annual Renewal** → for yearly contracts
- **Quarterly Renewal** → for quarterly contracts

The screenshot shows the Salesforce Setup interface under the Object Manager section. The left sidebar is collapsed. The main area displays a table titled 'Record Types' with two entries:

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
Priority Renewal		✓	Anish Ahuja, 20/09/2025, 10:09 pm
Standard Renewal		✓	Anish Ahuja, 23/09/2025, 1:07 pm

Support Case

- **Customer Support Case** → includes Escalation Level, Description
- **Technical Support Case** → includes Resolution Deadline, Escalation Level

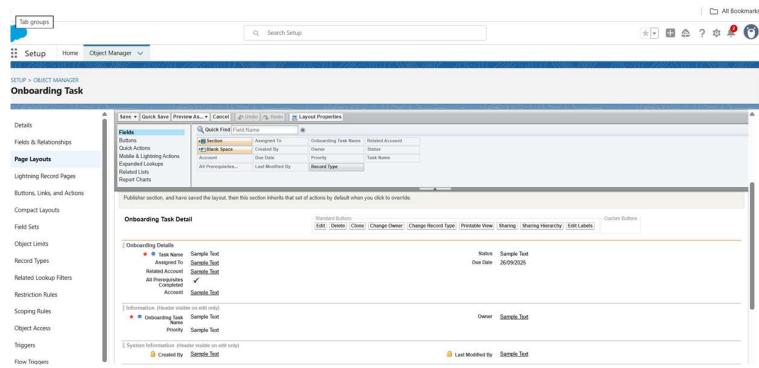
The screenshot shows the Salesforce Setup interface under the Object Manager section. The left sidebar is collapsed. The main area displays a table titled 'Record Types' with two entries:

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
Customer Support Case		✓	Anish Ahuja, 23/09/2025, 4:31 pm
Technical Support Case		✓	Anish Ahuja, 23/09/2025, 4:31 pm

4. Page Layouts

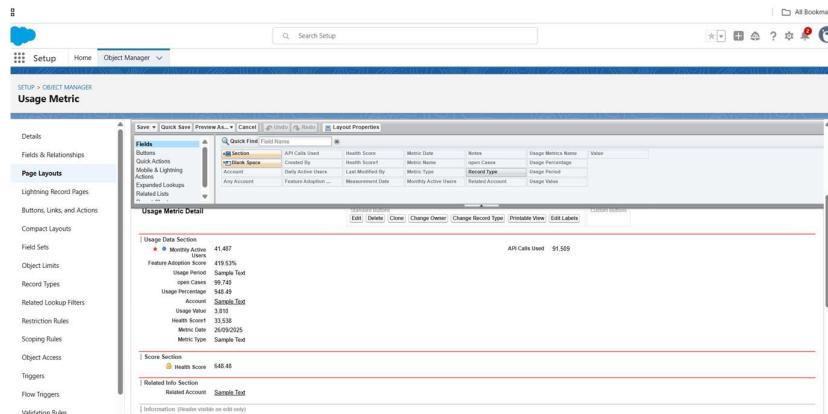
Onboarding Task Layout

- Section: Onboarding Details → Task Name, Status, Due Date, Assigned To
- Section: Related Info → Related Account



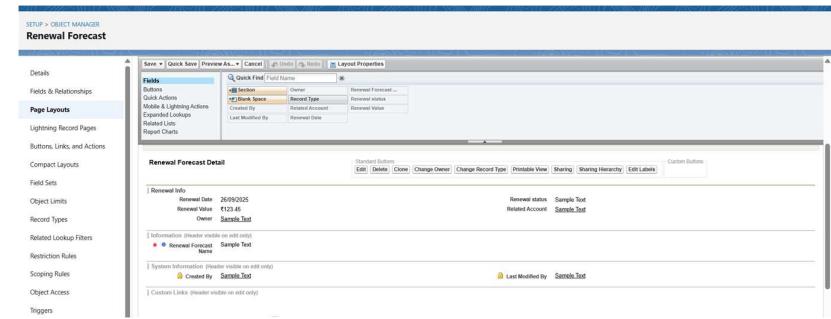
Usage Metric Layout

- Section: Usage Data → Monthly Active Users, API Calls Used, Feature Adoption Score
- Section: Score → Health Score
- Section: Related Info → Related Account



Renewal Forecast Layout

- Section: Renewal Info → Renewal Date, Renewal Status, Renewal Value
- Section: Related Info → Related Account



Case Layouts

- Customer Support Case → Case Type, Priority, Status, Escalation Level, Related Account, Description
- Technical Support Case → Case Type, Priority, Status, Escalation Level, Resolution Deadline, Related Account

Case Page Layouts			
PAGE LAYOUT NAME	CREATED BY	MODIFIED BY	
Case (Marketing) Layout	Anish Ahuja, 19/09/2025, 12:57 pm	Anish Ahuja, 26/09/2025, 2:41 pm	▼
Case (Sales) Layout	Anish Ahuja, 19/09/2025, 12:57 pm	Anish Ahuja, 26/09/2025, 2:41 pm	▼
Case (Support) Layout	Anish Ahuja, 19/09/2025, 12:57 pm	Anish Ahuja, 26/09/2025, 2:41 pm	▼
Case Layout	Anish Ahuja, 19/09/2025, 12:57 pm	Anish Ahuja, 26/09/2025, 2:41 pm	▼
Customer Support Case Layout	Anish Ahuja, 23/09/2025, 4:03 pm	Anish Ahuja, 26/09/2025, 2:41 pm	▼
Technical Support Case Layout	Anish Ahuja, 23/09/2025, 4:11 pm	Anish Ahuja, 26/09/2025, 2:41 pm	▼

5. Compact Layouts

Onboarding Task

- Task Name
- Status
- Due Date
- Related Account

Compact Layouts				
LABEL	API NAME	PRIMARY	MODIFIED BY	LAST MODIFIED
Existing Customer Task Highlights	Existing_Customer_Task_Highlights	✓	Anish Ahuja	23/09/2025, 1:59 pm
New Customer Task Highlights	New_Customer_Task_Highlights	✓	Anish Ahuja	23/09/2025, 2:00 pm
System Default	SYSTEM	✓		

Usage Metric

- Monthly Active Users
- Feature Adoption Score
- Health Score
- Related Account

SETUP > OBJECT MANAGER
Usage Metric

Compact Layouts

LABEL	API NAME	PRIMARY	MODIFIED BY	LAST MODIFIED
API Usage Highlights	API_Usage_Highlights	Anish Ahuja	23/09/2025, 2:04 pm	
Product Usage Highlights	Product_Usage_Highlights	Anish Ahuja	23/09/2025, 2:06 pm	
System Default	SYSTEM			

Renewal Forecast

- Renewal Date
- Renewal Status
- Renewal Value
- Related Account

SETUP > OBJECT MANAGER
Renewal Forecast

Compact Layouts

LABEL	API NAME	PRIMARY	MODIFIED BY	LAST MODIFIED
Priority Renewal Highlights	Priority_Renewal_Highlights	Anish Ahuja	23/09/2025, 2:12 pm	
Standard Renewal Highlights	Standard_Renewal_Highlights	Anish Ahuja	23/09/2025, 2:11 pm	
System Default	SYSTEM			

Support Case

- Case Number (Standard)
- Case Type
- Escalation Level
- Status
- Related Account

Setup Home Object Manager

TUP > OBJECT MANAGER

ase

Compact Layouts

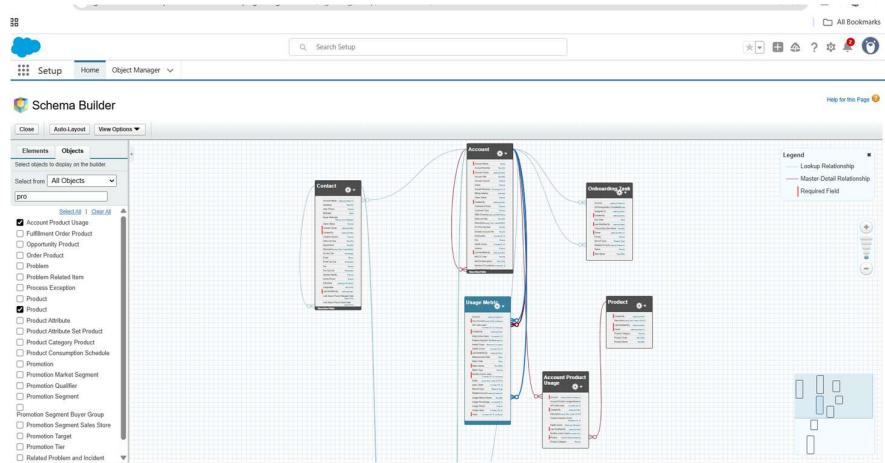
3 Items, Sorted by Label

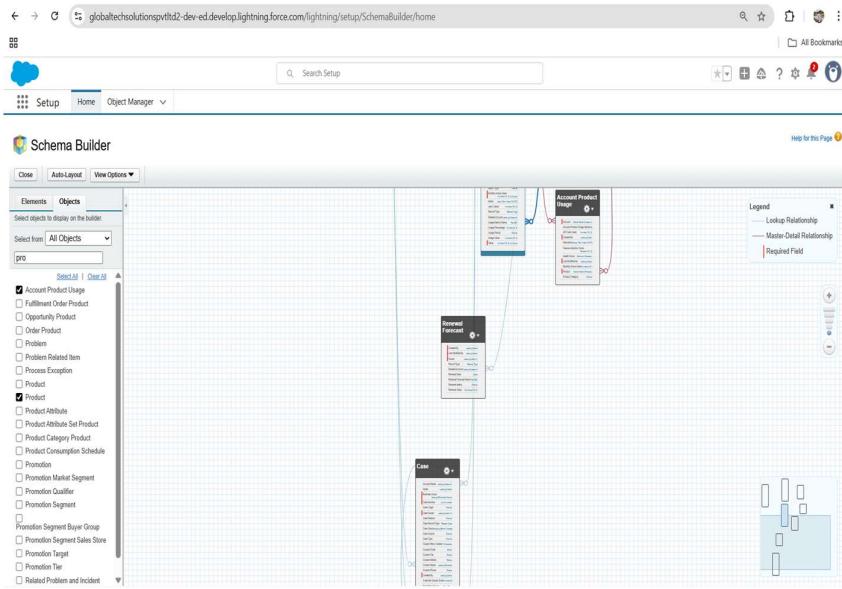
LABEL	API NAME	PRIMARY	MODIFIED BY	LAST MODIFIED
Customer Support Case Highlights	Customer_Support_Case_Highlights	Anish Ahuja	26/09/2025, 5:35 pm	
System Default	SYSTEM			
Technical Support Case Highlights	Technical_Support_Case_Highlights	Anish Ahuja	23/09/2025, 4:40 pm	

Details
Fields & Relationships
Case Page Layouts
Case Close 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
Hierarchy Columns
Copying Rules
Object Access

6. Schema Builder Verification

- Verified relationships:
 - Onboarding Task → Account (Lookup)
 - Usage Metric → Account (Lookup)
 - Renewal Forecast → Account (Lookup)
 - Case → Account & Contact (Lookup)
 - Account Product Usage → Account & Product (Master-Detail)
- Confirmed all custom fields and relationships appear visually.





7. Relationships Used

- **Lookup Relationship:** Onboarding Task → Account, Usage Metric → Account, Renewal Forecast → Account, Case → Account/Contact
- **Master-Detail Relationship:** Account Product Usage → Account, Account Product Usage → Product
- **Hierarchical Relationship:** Not used in this project

8. Junction Object

- Created **Account Product Usage** to track product-level usage per account.
- Fields: Monthly Active Users, API Calls Used, Feature Adoption Score, Health Score.
- Related lists added to both Account and Product layouts.

9. External Objects

- All data (onboarding, usage metrics, renewals, support cases) is **internal to Salesforce**.
- You're not pulling live data from an external system like **ERP, external DB, or third-party API**.
- So, **no external objects are required**.

 **Phase 3 Deliverables Completed**

- Standard & Custom Objects defined
- Fields created
- Record Types configured
- Page Layouts customized
- Compact Layouts built
- Schema Builder verified
- Lookup vs Master-Detail relationships designed
- Junction Object (Account Product Usage) created