

Phase 3: Data Modeling & Relationships

This phase covers creating custom objects, fields, relationships, layouts, and adding sample data.

Step: Create Custom Objects

Navigation:

Setup → Object Manager → Create → Custom Object

Objects to create:

Object Name	API Name
Patient	Patient_c
Genetic Test	Genetic_Test_c
Doctor	Doctor_c
Hospital Partner	Hospital_Partner_c
Sample	Sample_c

The image contains three separate screenshots of the Salesforce Object Manager interface, each showing a different custom object being created and listed in the Object Manager.

Screenshot 1 (Patient Creation):

- Search bar: patient
- Table Headers: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, DEPLOYED
- Data:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Patient	Patient_c	Custom Object		9/24/2025	✓

Screenshot 2 (Doctor Creation):

- Search bar: doctor
- Table Headers: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, DEPLOYED
- Data:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Doctor	Doctor_c	Custom Object		9/24/2025	✓

Screenshot 3 (Sample Creation):

- Search bar: samp
- Table Headers: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, DEPLOYED
- Data:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Sample	Sample_c	Custom Object		9/23/2025	✓

The screenshot shows the Salesforce Object Manager. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager'. Below it is a search bar with 'Search Setup' and a magnifying glass icon. On the right side of the header are various icons for account management. The main area is titled 'Object Manager' with a sub-header '1 Items, Sorted by Label'. A table lists one item: 'Hospital Partner' with API name 'Hospital_Partner__c', Type 'Custom Object', and Description 'Custom Object'. The last modified date is '9/24/2025' and the status is 'Deployed'.

Step: Create Fields

Each object needs fields to capture record details.

- **Patient__c Fields**

Field Label	Field Name	Type
Address	Address__c	Text Area (255)
DOB	DOB__c	Date
Email	Email__c	Email
First Name	First_Name__c	Text (20)
Last Name	Last_Name__c	Text (20)
<u>Gender</u>	Gender__c	Picklist
Insurance Number	Insurance_Number__c	Text (15)
Owner	OwnerId	Lookup (User, Group)
Patient Name	Name	Text (80)
<u>Patient_ID_1</u>	Patient_ID_1__c	Text (60)
Phone	Phone__c	Phone

- **Genetic_Test__c Fields**

Field Label	Field Name	Type
Cost	Cost__c	Currency (18, 0)

<u>Doctor</u>	Doctor__c	Lookup(Doctor)
Genetic_Test Name	Name	Text(80)
Hospital Partner	Hospital_Partner__c	Lookup(Hospital Partner)
Insurance Status	Insurance_Status__c	Picklist
<u>Owner</u>	OwnerId	Lookup (User, Group)
Patient	Patient__c	Lookup (Patient)
Scheduled Date	Scheduled_Date__c	Date/Time
Test ID	Test_ID__c	Text (10) (External ID) (Unique Case Insensitive)
Test Status	Test_Status__c	Picklist
Test Type	Test_Type__c	Picklist
Turnaround Days	Turnaround_Days__c	Number (18, 0)

- **Doctor__c Fields**

Field Label	Field Name	Types
Doctor ID	Doctor_ID__c	Text (10)
Doctor Name	Name	Text (80)
Name	Name__c	Text (20)
Owner	OwnerId	Lookup (User, Group)
Phone	Phone__c	Phone
Speciality	Speciality__c	Picklist

- **Hospital_Partner__c Field**

Field Label	Field Name	Types
Address	Address__c	Text(60)
Contact	Contact__c	Phone
Created By	CreatedById	Lookup(User)
Email	Email__c	Email
Hospital Partner Name	Name	Text(80)
Last Modified By	LastModifiedById	Lookup(User)
Owner	OwnerId	Lookup(User,Group)
Partner ID	Partner_ID__c	Text(10) (Unique Case Insensitive)

- **Sample__c Field**

Field Label	Field Name	Type
Collection Date	Collection_Date__c	Date/Time
Created By	CreatedById	Lookup(User)
Lab Staff Email	Lab_Staff_Email__c	Email
Sample ID	Sample_ID__c	Text(20) (External ID) (Unique Case Insensitive)
Sample Name	Name	Text(80)
Sample Type	Sample_Type__c	Picklist
Status	Status__c	Picklist
Test	Test__c	Master-Detail(Genetic Test)

Setup Home Object Manager

SETUP > OBJECT MANAGER Patient

Fields & Relationships				
13 Items, Sorted by Field Label				
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address_c	Text Area(255)		▼
Created By	CreatedBy	Lookup(User)		▼
DOB	DOB_c	Date		▼
Email	Email_c	Email		▼
First Name	First_Name_c	Text(20)		▼
Gender	Gender_c	Picklist		▼
Insurance Number	Insurance_Number_c	Text(15)		▼
Last Modified By	LastModifiedBy	Lookup(User)		▼
Last Name	Last_Name_c	Text(20)		▼
Owner	OwnerId	Lookup(User/Group)	✓	▼
Patient Name	Name	Text(80)	✓	▼
Patient_ID_1	Patient_ID_1_c	Text(60)		▼
Phone	Phone_c	Phone		▼

Setup Home Object Manager

SETUP > OBJECT MANAGER Genetic Test

Fields & Relationships				
14 Items, Sorted by Field Label				
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Cost	Cost_c	Currency(18, 0)		▼
Created By	CreatedBy	Lookup(User)		▼
Doctor	Doctor_c	Lookup(Doctor)	✓	▼
Genetic_Test Name	Name	Text(80)	✓	▼
Hospital Partner	Hospital_Partner_c	Lookup(Hospital Partner)	✓	▼
Insurance Status	Insurance_Status_c	Picklist		▼
Last Modified By	LastModifiedBy	Lookup(User)		▼
Owner	OwnerId	Lookup(User/Group)	✓	▼
Patient	Patient_c	Lookup(Patient)	✓	▼
Scheduled Date	Scheduled_Date_c	Date/Time		▼
Test ID	Test_ID_c	Text(10) (External ID) (Unique Case Insensitive)	✓	▼
Test Status	Test_Status_c	Picklist		▼
Test Type	Test_Type_c	Picklist		▼
Turnaround Days	Turnaround_Days_c	Number(18, 0)		▼

Setup > Object Manager Doctor

Fields & Relationships					
8 Items, Sorted by Field Label					
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED	
Created By	CreatedById	Lookup(User)			
Doctor ID	Doctor_ID_c	Text(10)			
Doctor Name	Name	Text(80)			
Last Modified By	LastModifiedById	Lookup(User)			
Name	Name_c	Text(20)			
Owner	OwnerId	Lookup(User,Group)			
Phone	Phone_c	Phone			
Specialty	Specialty_c	Picklist			

Setup > Object Manager Hospital Partner

Fields & Relationships					
8 Items, Sorted by Field Label					
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED	
Address	Address_c	Text(60)			
Contact	Contact_c	Phone			
Created By	CreatedById	Lookup(User)			
Email	Email_c	Email			
Hospital Partner Name	Name	Text(80)			
Last Modified By	LastModifiedById	Lookup(User)			
Owner	OwnerId	Lookup(User,Group)			
Partner ID	Partner_ID_c	Text(10) (Unique Case Insensitive)			

Setup > Object Manager Sample

Fields & Relationships					
9 Items, Sorted by Field Label					
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED	
Collection Date	Collection_Date_c	Date/Time			
Created By	CreatedById	Lookup(User)			
Lab Staff Email	Lab_Staff_Email_c	Email			
Last Modified By	LastModifiedById	Lookup(User)			
Sample ID	Sample_ID_c	Text(20) (External ID) (Unique Case Insensitive)			
Sample Name	Name	Text(80)			
Sample Type	Sample_Type_c	Picklist			
Status	Status_c	Picklist			
Test	Test_c	Master-Detail(Genetic Test)			

- **Create Relationships**

Sample_c

- Master-Detail (Test → Genetic Test)

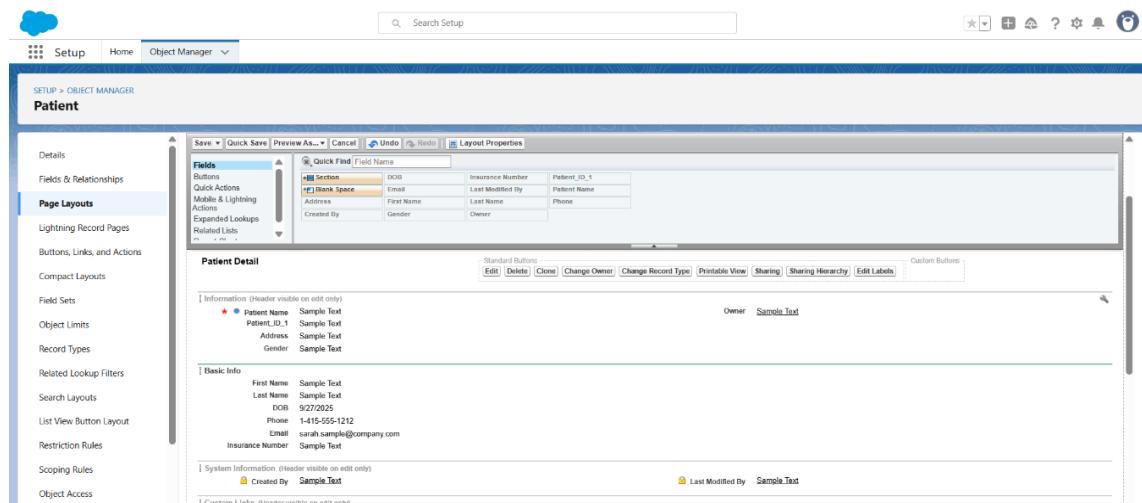
Genetic_Test_c

- Lookup (Doctor → Doctor, Hospital Partner → Hospital Partner)
- Lookup (Patient → Patient)

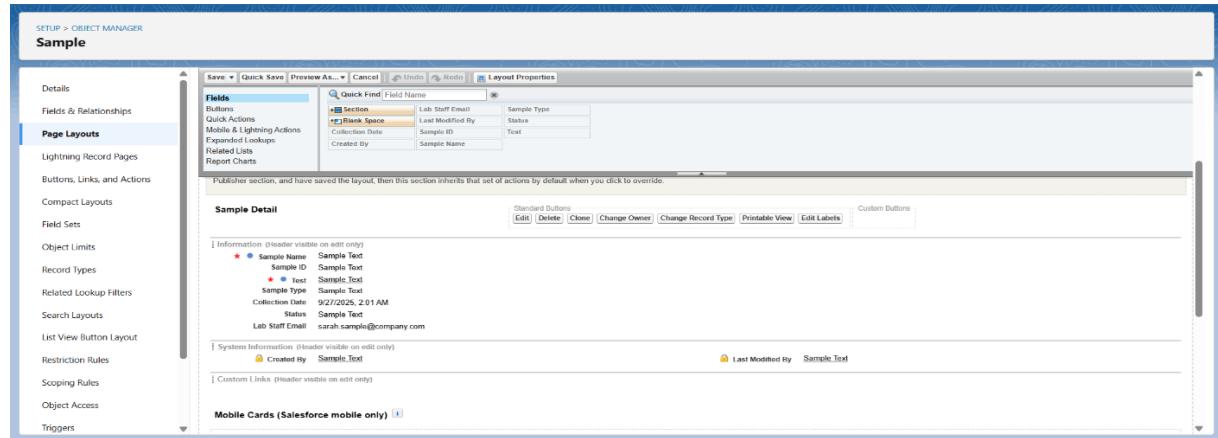
Step: Configure Page Layouts

Patient_c Layout → Basic Info, Information

Sample_c Layout



The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. Under the 'Patient' object, the 'Page Layouts' tab is active. On the left, a sidebar lists various configuration options like Details, Fields & Relationships, and Lightning Record Pages. The main area displays the 'Patient Detail' page layout. The 'Basic Info' section is expanded, showing fields such as First Name, Last Name, DOB, Phone, and Insurance Number. Below this is a 'System Information' section with Created By and Last Modified By fields. At the bottom, there's a note about custom links.



The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. Under the 'Sample' object, the 'Page Layouts' tab is active. The sidebar and layout structure are identical to the Patient setup, showing the 'Patient Detail' page layout with its 'Basic Info' and 'System Information' sections. A note at the bottom indicates that the layout inherits actions from the Publisher section if saved.

Step: Schema Builder

Visual diagram shows relationships:

Patient_c → Genetic_Test_c (Master-Detail)

Genetic_Test_c → Sample_c (Master-Detail)

Genetic_Test_c → Report_c (Master-Detail)

Genetic_Test_c → Doctor_c (Lookup)

Genetic_Test_c → Hospital_Partner_c (Lookup)

