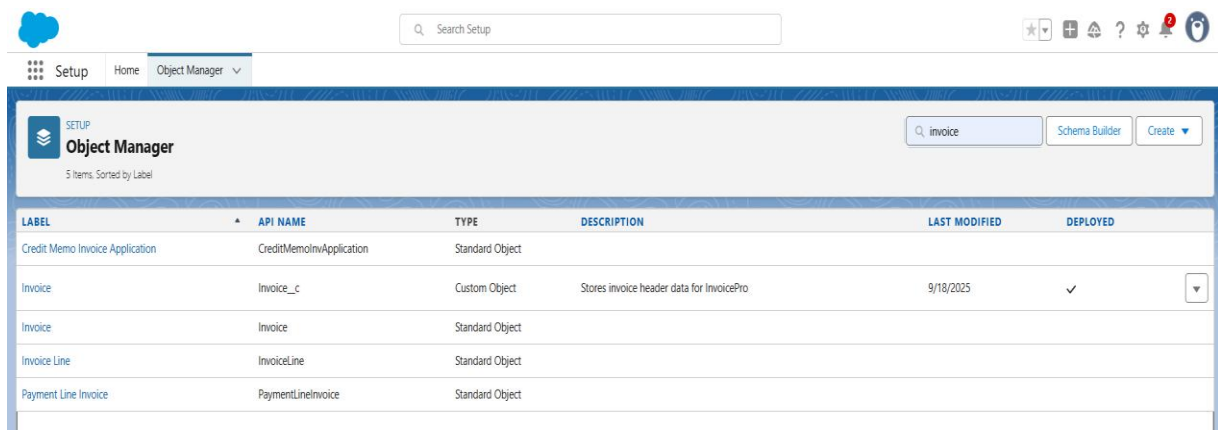


# Phase 3 — Data Modeling & Relationships

## 1. Create Custom Objects

- **Setup → Object Manager → Create → Custom Object**
  - Invoice → Invoice\_\_c → Auto Number: INV-{0000}
  - Payment → Payment\_\_c → Auto Number: PAY-{0000}
  - Reminder → Reminder\_\_c → Auto Number: REM-{0000}

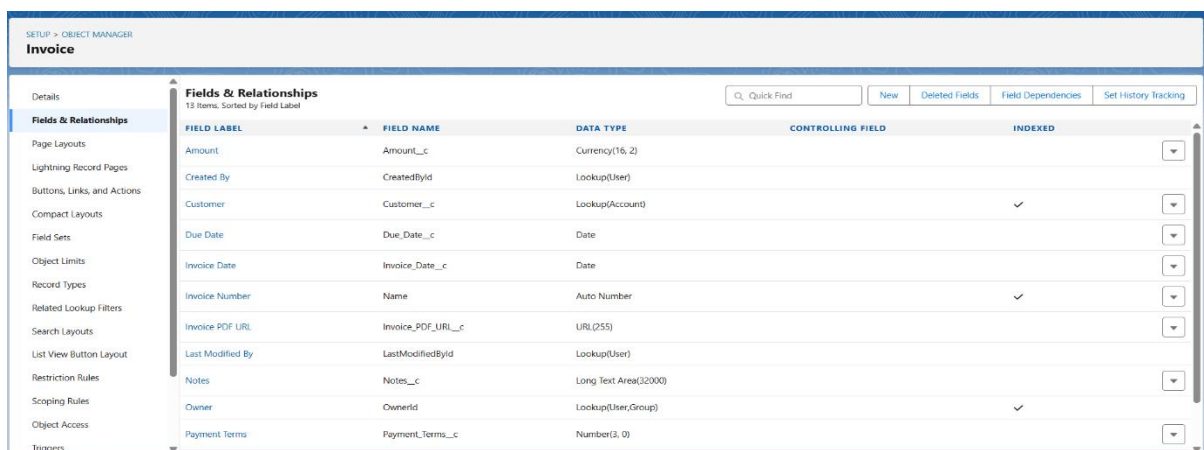


The screenshot shows the Salesforce Object Manager interface. At the top, there's a search bar with "Search Setup" and a navigation menu with "Setup", "Home", and "Object Manager". Below the navigation bar, the "Object Manager" section is active, showing a list of objects. The table has columns: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The objects listed are: Credit Memo Invoice Application (Standard Object), Invoice (Custom Object, last modified 9/18/2025), Invoice (Standard Object), Invoice Line (Standard Object), and Payment Line Invoice (Standard Object).

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Credit Memo Invoice Application	CreditMemoInvApplication	Standard Object			
Invoice	Invoice__c	Custom Object	Stores invoice header data for InvoicePro	9/18/2025	✓
Invoice	Invoice	Standard Object			
Invoice Line	InvoiceLine	Standard Object			
Payment Line Invoice	PaymentLineInvoice	Standard Object			

## 2. Add Fields to Objects

- **Setup → Object Manager → Invoice → Fields & Relationships → New**
  - Invoice\_\_c Fields
  - Payment\_\_c Fields
  - Reminder\_\_c Fields



The screenshot shows the Salesforce Object Manager interface for the 'Invoice' object. The 'Fields & Relationships' section is active, showing a list of fields. The table has columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are: Amount (Currency(16, 2)), Created By (Lookup(User)), Customer (Lookup(Account)), Due Date (Date), Invoice Date (Date), Invoice Number (Auto Number), Invoice PDF URL (URL(255)), Last Modified By (Lookup(User)), Notes (Long Text Area(32000)), Owner (Lookup(User,Group)), and Payment Terms (Number(3, 0)).

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Currency(16, 2)		
Created By	CreatedById	Lookup(User)		
Customer	Customer__c	Lookup(Account)		✓
Due Date	Due_Date__c	Date		
Invoice Date	Invoice_Date__c	Date		
Invoice Number	Name	Auto Number		✓
Invoice PDF URL	Invoice_PDF_URL__c	URL(255)		
Last Modified By	LastModifiedById	Lookup(User)		
Notes	Notes__c	Long Text Area(32000)		
Owner	OwnerId	Lookup(User,Group)		✓
Payment Terms	Payment_Terms__c	Number(3, 0)		

### 3. Relationships

- **Payment → Master-Detail → Invoice** → Payments inherit owner/sharing
- **Reminder → Lookup → Invoice** → Reminders related list
- **Invoice → Lookup → Account** → Customer linked

SETUP > OBJECT MANAGER  
Invoice

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  
Object Access  
Triggers

Invoice Custom Field  
Customer  
[Back to Invoice](#)

Validation Rules (0)

Custom Field Definition Detail

Field Information

Field Label	Customer	Object Name	Invoice
Field Name	Customer	Data Type	Lookup
API Name	Customer__c		
Description	Account linked to this invoice (customer).		
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Ayush Sayakmal	Modified By	Ayush Sayakmal
	9/18/2025, 1:36 AM		9/18/2025, 5:33 AM

Lookup Options

Related To	Account	Child Relationship Name	Invoices
Related List Label	Invoices		
Required	<input checked="" type="checkbox"/>		
What to do if the lookup record is deleted?	Don't allow deletion of the lookup record that's part of a lookup relationship.		

Lookup Filter

No lookup filters defined.

Validation Rules

New

Validation Rules Help ?

### 4. Record Types (Invoice)

- **Setup → Object Manager → Invoice → Record Types → New**
  - Draft → Default for Finance Profile
  - Sent → Finance, Manager profiles
  - Paid → Finance, Manager profiles
  - Overdue → Finance, Manager profiles

SETUP > OBJECT MANAGER  
Invoice

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  
Object Access

Record Types

4 Items, Sorted by Record Type Label

Quick Find New Page Layout Assignment

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
Draft	Initial invoices not yet sent	✓	Ayush Sayakmal, 9/18/2025, 3:32 AM
Overdue	Invoice past due date	✓	Ayush Sayakmal, 9/18/2025, 7:19 AM
Paid	Invoice fully paid	✓	Ayush Sayakmal, 9/18/2025, 3:36 AM
Sent	Invoice sent to customer	✓	Ayush Sayakmal, 9/18/2025, 3:35 AM

## 5. Page Layouts & Compact Layouts

- **Invoice\_Finance\_Layout:**

- Highlight Panel → Invoice Number, Status\_\_c, Amount\_\_c, Due\_Date\_\_c
- Sections → Invoice Details & Notes
- Related Lists → Payments, Reminders, Activity History, Notes
- Compact Layout → Invoice\_Compact\_Finance
- Assign → Finance Profile, all record types

- **Invoice\_Manager\_Layout:**

- Highlight Panel → Invoice Number, Status\_\_c, Amount\_\_c, Customer\_\_c
- Sections → Invoice Details, Finance Notes / Escalation
- Related Lists → Payments, Reminders, Activity History
- Compact Layout → Invoice\_Compact\_Manager
- Assign → Manager Profile, all record types

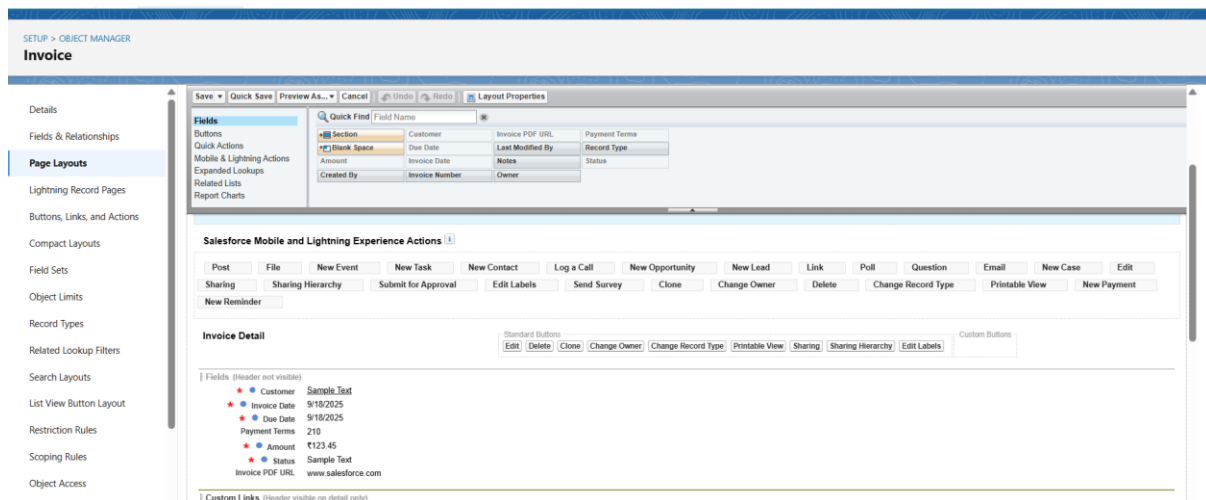
The screenshot shows the 'Page Layouts' configuration page for the 'Invoice' object in Salesforce. The left sidebar contains a navigation menu with options: Details, Fields & Relationships, Page Layouts (selected), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area is titled 'Page Layouts' and shows a list of 3 items, sorted by Page Layout Name. The table has columns for 'PAGE LAYOUT NAME', 'CREATED BY', and 'MODIFIED BY'. The listed layouts are 'Invoice Layout', 'Invoice\_Finance\_Layout', and 'Invoice\_Manager\_Layout', all created by 'Ayush Saysikmal' on 9/18/2025. Each row has a dropdown arrow on the right for further actions.

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Invoice Layout	Ayush Saysikmal, 9/18/2025, 1:34 AM	Ayush Saysikmal, 9/18/2025, 4:20 AM
Invoice_Finance_Layout	Ayush Saysikmal, 9/18/2025, 3:55 AM	Ayush Saysikmal, 9/18/2025, 4:46 AM
Invoice_Manager_Layout	Ayush Saysikmal, 9/18/2025, 4:08 AM	Ayush Saysikmal, 9/18/2025, 4:20 AM



## 7. Related Lists & Buttons

- **Setup → Object Manager → Invoice → Page Layouts → Edit Layout**
  - Payments → Payment Number, Payment Date, Amount Paid, Payment Method, Status
  - Reminders → Reminder Date, Status, Escalation Flag
  - Quick Actions → New Payment / New Reminder (requires tabs)



## 8. Schema Builder Verification

- **Setup → Schema Builder → Add Invoice, Payment, Reminder, Account**
  - Confirm relationships: Payment → Master-Detail → Invoice; Reminder → Lookup → Invoice; Invoice → Lookup → Account
  - Rearrange & save/export visual

# Schema Builder

Help for this Page

Close Auto-Layout View Options

Elements Objects

Select objects to display on the builder

Select from All Objects

Quick Find

Select All Clear All

- ☒ Account
- ☐ Activation Target
- ☐ Active Scratch Org
- ☐ Activity
- ☐ Address
- ☐ Alternative Payment Method
- ☐ Appointment Category
- ☐ Appointment Invitation
- ☐ Appointment Invitee
- ☐ Appointment Topic Time Slot
- ☐ Approval Submission
- ☐ Approval Submission Detail
- ☐ Approval Work Item
- ☐ Asset
- ☐ Asset Action
- ☐ Asset Action Source
- ☐ Asset Relationship
- ☐ Asset State Period
- ☐ Assigned Resource
- ☐ Associated Location
- ☐ Authorization Form
- ☐ Authorization Form Consent

Invoice	
Amount	Currency(16, 2)
Created By	Lookup(User)
Customer	Lookup(Account)
Due Date	Date
Invoice Date	Date
Invoice Number	Auto Number
Invoice PDF URL	URL(255)
Last Modified By	Lookup(User)
Notes	Long Text Area(32000)
Owner	Lookup(User+1)
Payment Terms	Number(3, 0)
Record Type	Record Type
Status	Picklist

Reminder	
Created By	Lookup(User)
Escalation Flag	Checkbox
Invoice	Lookup(Invoice)
Last Modified By	Lookup(User)
Notes	Long Text Area(32768)
Owner	Lookup(User+1)
Reminder Date	Date
Reminder Number	Auto Number
Status	Picklist

Payment	
Amount Paid	Currency(16, 2)
Created By	Lookup(User)
Invoice	Master-Detail(Invoice)
Last Modified By	Lookup(User)
Payment Date	Date
Payment Method	Picklist
Payment Number	Auto Number
Payment Status	Picklist
Transaction ID	Text(255)

Legend

- Lookup Relationship
- Master-Detail Relationship
- Required Field

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