Project Title: Smart Customer Retention & Loyalty Management System

Phase 3: Data Modeling & Relationships

Step 1: Standard & Custom Objects

Standard Objects (already available)

- **Account** → represents a company or organization.
- **Contact** → represents individual customers belonging to Accounts.

👉 You don't need to create these; just know you will link them later.

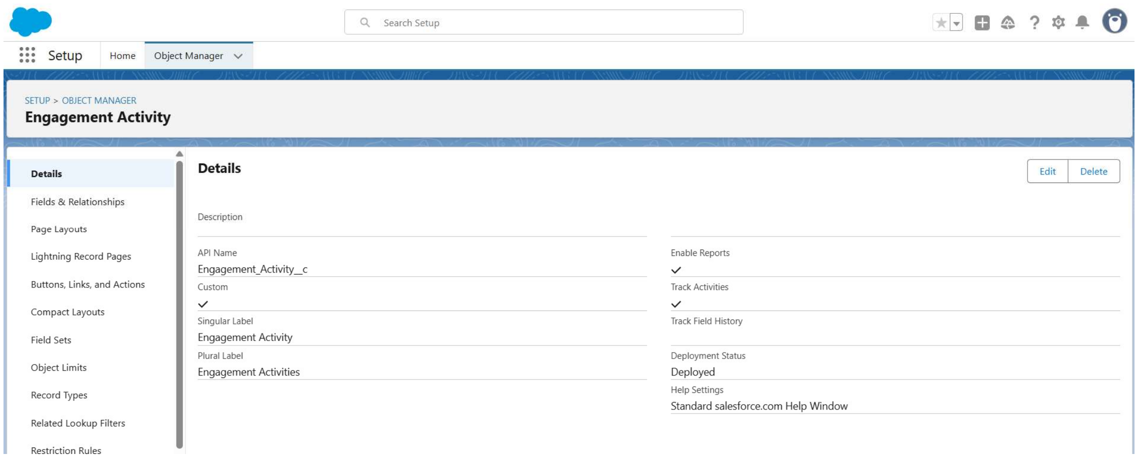
Create New Custom Objects

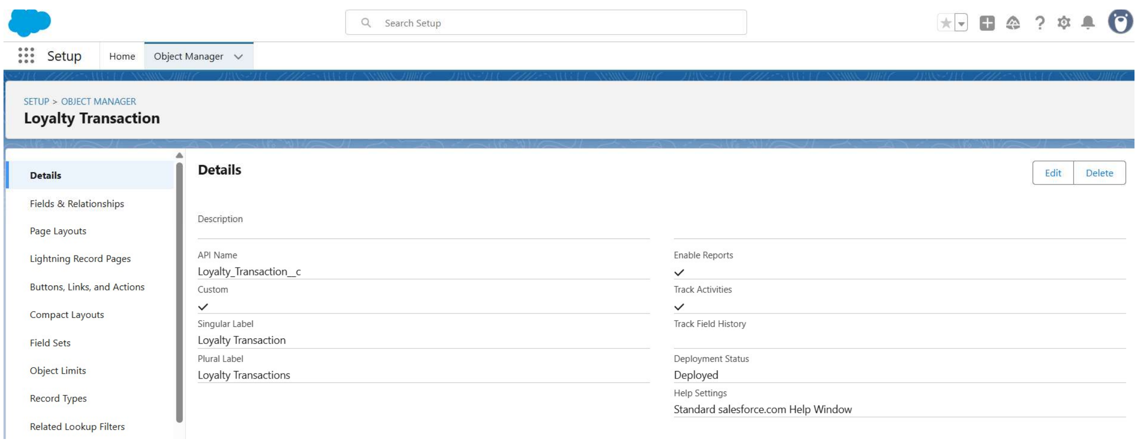
A. Loyalty Transaction

1. Click ⚙ **Setup** → **Object Manager** → **Create** → **Custom Object**.
2. Fill details:
   - Label: Loyalty Transaction
   - Plural Label: Loyalty Transactions
   - API Name: Loyalty_Transaction__c
   - Record Name: Transaction ID → Data Type: **Auto Number**
   - Format: TX-{0000}
   - Allow Reports: ✅ Allow Activities: ✅ Track Field History: ✅
3. Save.

B. Engagement Activity

1. Setup → Object Manager → New Custom Object.
2. Fill details:
   - Label: Engagement Activity
   - Plural Label: Engagement Activities
   - API Name: Engagement_Activity__c
   - Record Name: Activity Name (Text).
   - Allow Reports: ✅ Allow Activities: ✅
3. Save.

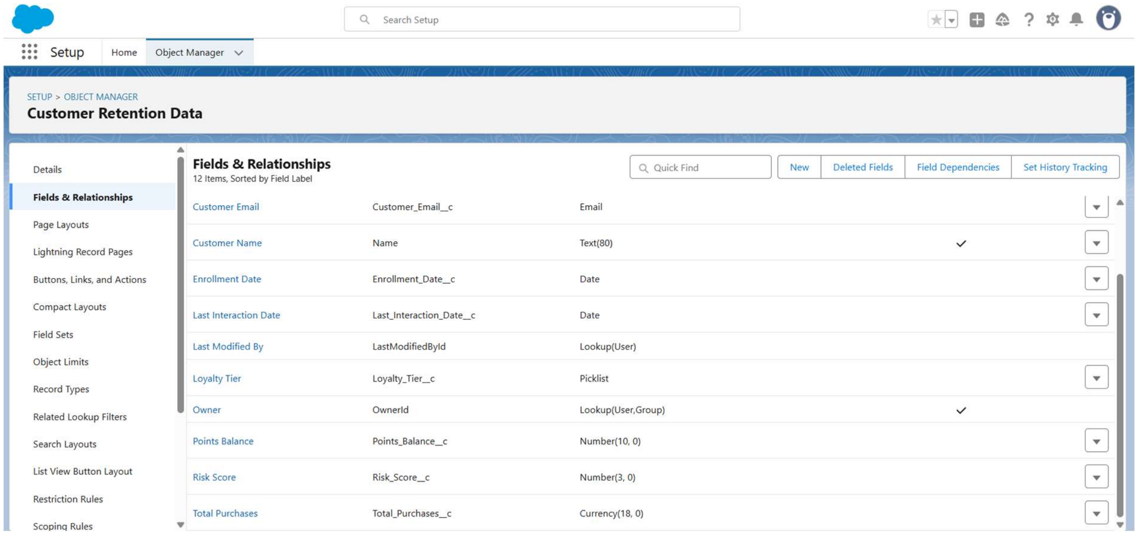




Step 2: Fields

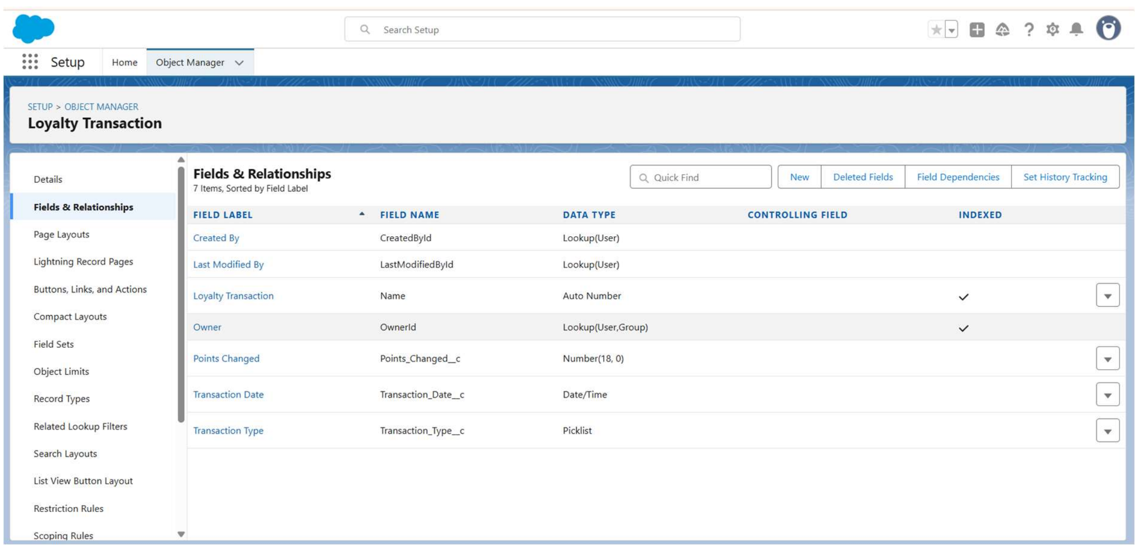
A. On Customer Retention Data

1. Go to **Object Manager → Customer Retention Data → Fields & Relationships → New**.
2. Create these fields:
   - **Customer Email** → Data Type: Email.
   - **Enrollment Date** → Data Type: Date.
   - **Total Purchases** → Data Type: Currency.



B. On Loyalty Transaction

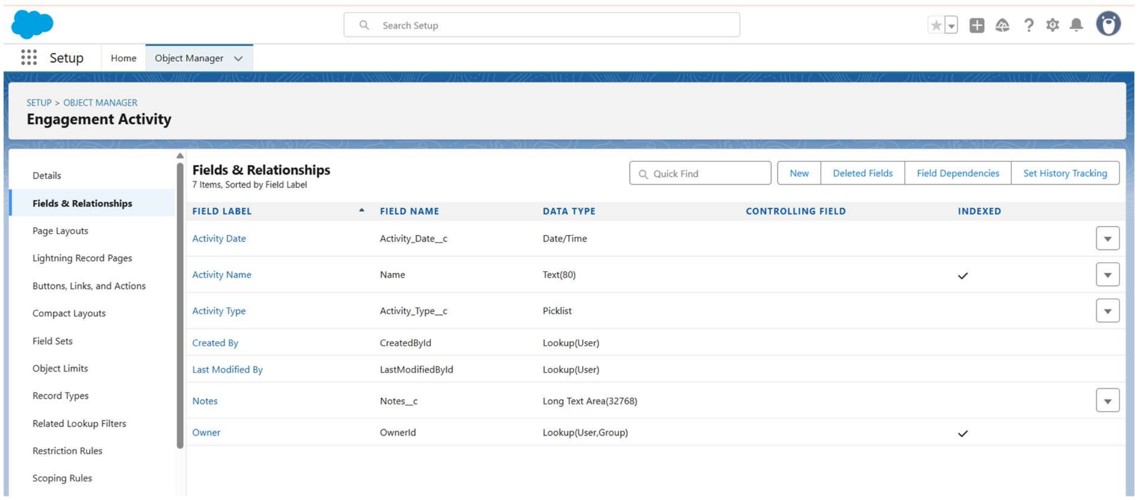
1. Object Manager → Loyalty Transaction → Fields & Relationships → New.
2. Create:
    - **Transaction Type** → Picklist (Credit, Debit).
    - **Points Changed** → Number.
    - **Transaction Date** → Date/Time.



C. On Engagement Activity

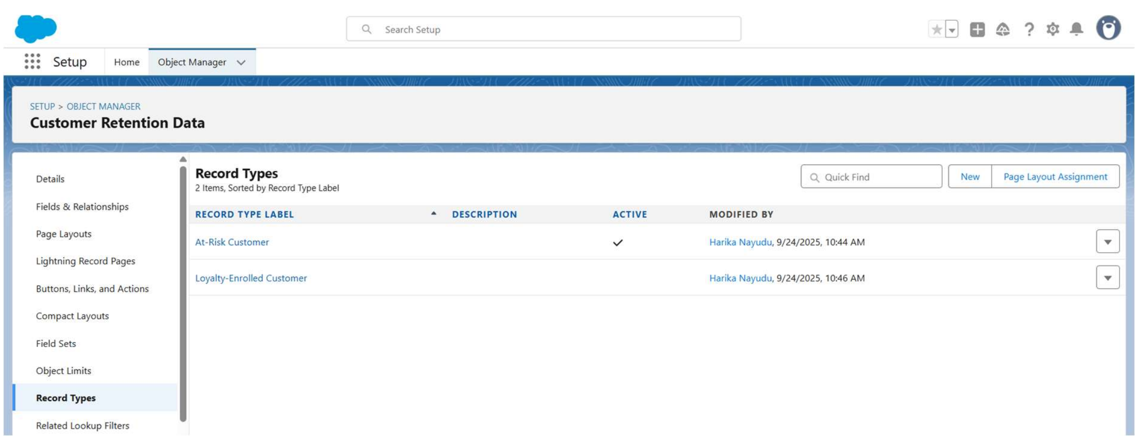
1. Object Manager → Engagement Activity → Fields & Relationships → New.
2. Create:
    - **Activity Type** → Picklist (Email, Call, Meeting, Survey).
    - **Activity Date** → Date/Time.

- **Notes** → Long Text Area.



Step 3: Record Types

1. Setup → Object Manager → Customer Retention Data → **Record Types** → **New**.
2. Create:
   - Record Type Label: At-Risk Customer → API Name: At_Risk_Customer.
   - Assign to profiles (System Admin, CSM).
3. Create another:
   - Label: Loyalty-Enrolled Customer → API Name: Loyalty_Enrolled_Customer.
   - Assign to profiles.

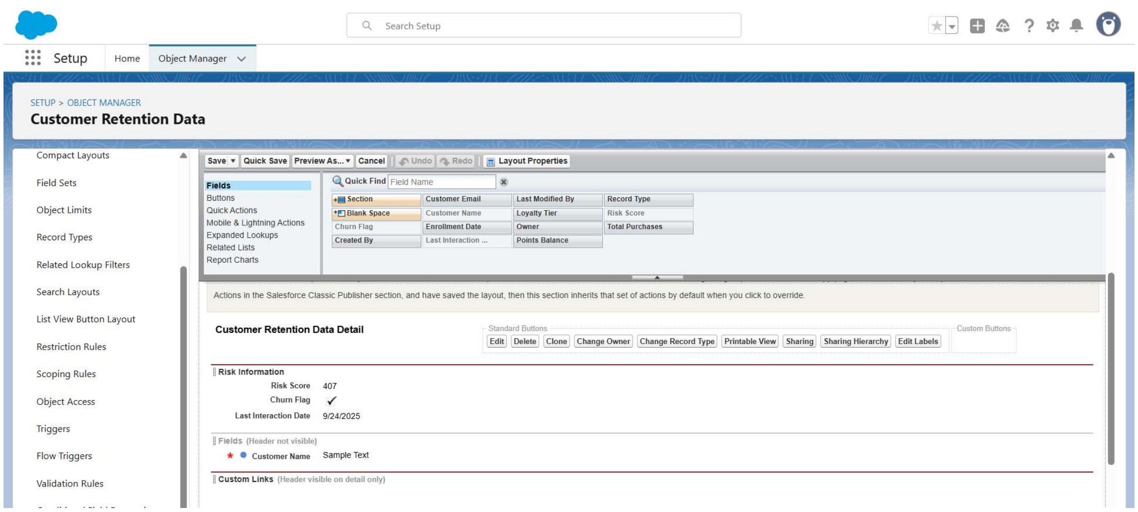


- **Step 4: Page Layouts**

1. Go to **Object Manager → Customer Retention Data → Page Layouts**.
2. Create two layouts:

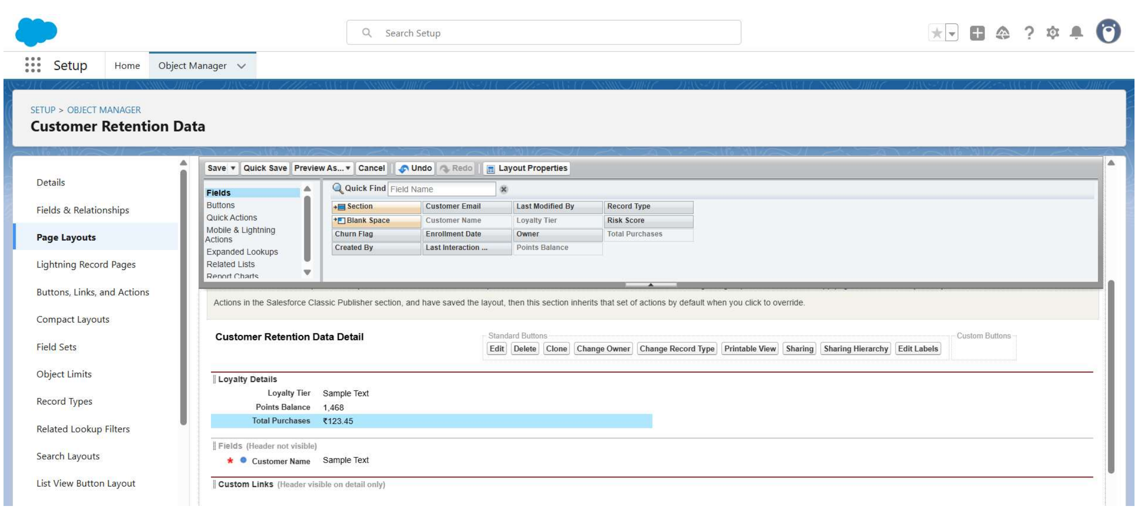
At-Risk Layout

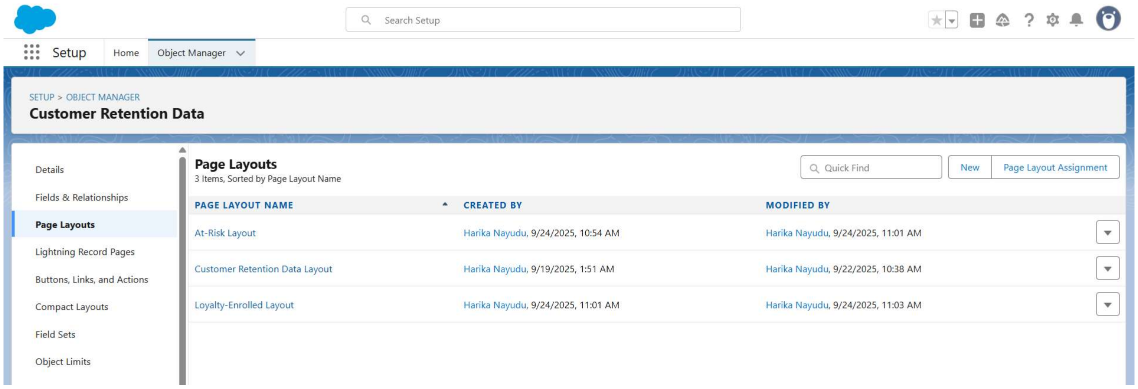
1. Click **New Page Layout**
2. Name it: At-Risk Layout.
3. In the layout editor:
    - Drag fields like **Risk Score**, **Churn Flag**, and **Last Interaction Date** into the section called **Risk Information**.
4. Save.



Loyalty-Enrolled Layout

1. Again, click **New Page Layout** → Name it: Loyalty-Enrolled Layout.
2. In the editor:
    - Drag fields like **Loyalty Tier**, **Points Balance**, and **Total Purchases** into a section called **Loyalty Details**.
3. Save.



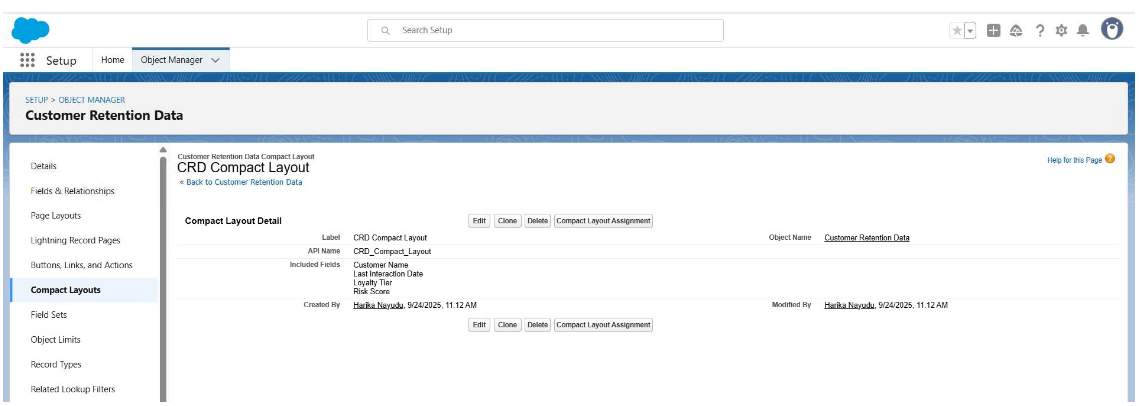


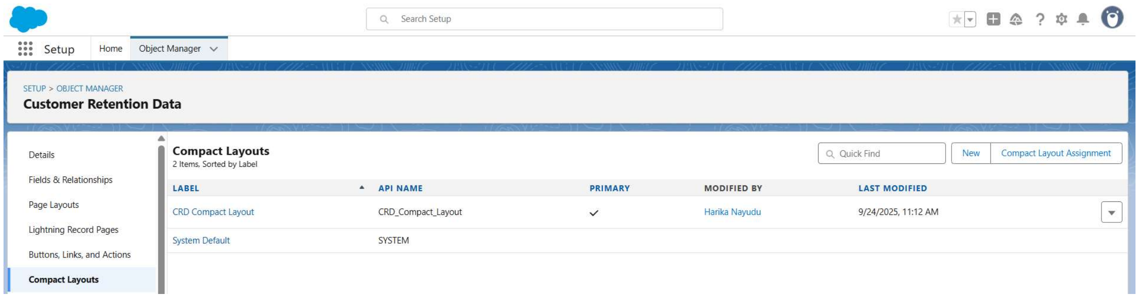
Assign Layouts to Record Types

1. Still inside **Page Layouts**, click the button **Page Layout Assignment** (top right).
2. Click it → then click **Edit Assignment**.
3. For:
   - **At-Risk Customer Record Type** → assign the **At-Risk Layout**.
   - **Loyalty-Enrolled Customer Record Type** → assign the **Loyalty-Enrolled Layout**.
4. Save.

Step 5: Compact Layouts

1. Go to Object Manager → Customer Retention Data → **Compact Layouts** → **New**.
2. Name: CRD Compact Layout.
3. Select fields: Customer Name, Loyalty Tier, Risk Score, Last Interaction Date.
4. Save → Set as **Primary Compact Layout**.





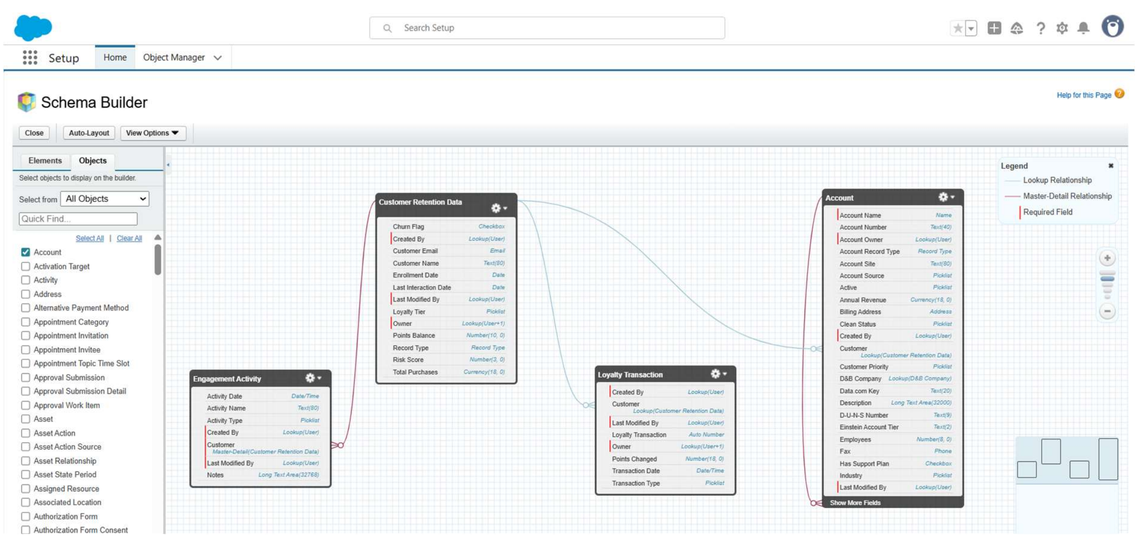
◆ **Step 6: Schema Builder**

1. Setup → Quick Find → **Schema Builder**.
2. From left panel, select objects:
   - Customer Retention Data
   - Loyalty Transaction
   - Engagement Activity
   - Account
3. Arrange them to clearly show relationships.

   Loyalty Transaction → Customer Retention Data (Lookup).

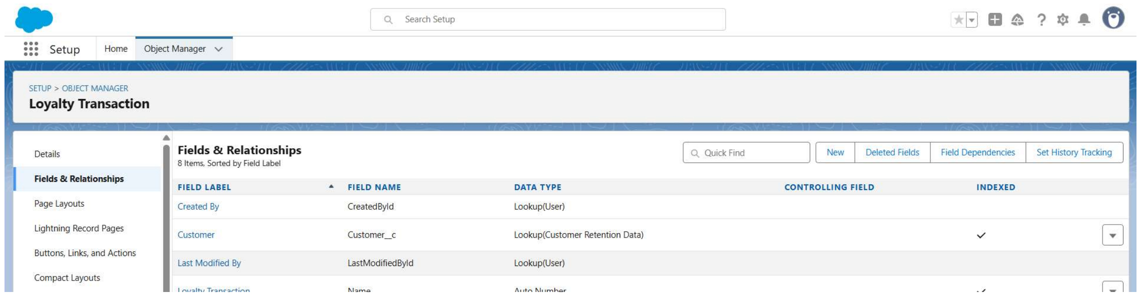
   Engagement Activity → Customer Retention Data (Master-Detail).

   Customer Retention Data → Account (Lookup).

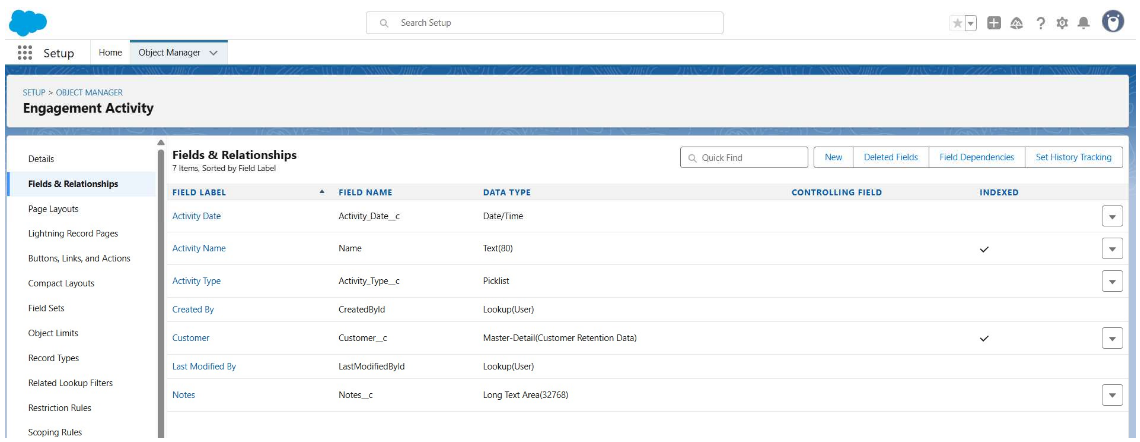


Step 7: Relationships

- **Lookup Relationship**
  - Loyalty Transaction → Customer Retention Data
  - (Steps: Loyalty Transaction → Fields & Relationships → New → Lookup → Related To Customer Retention Data).



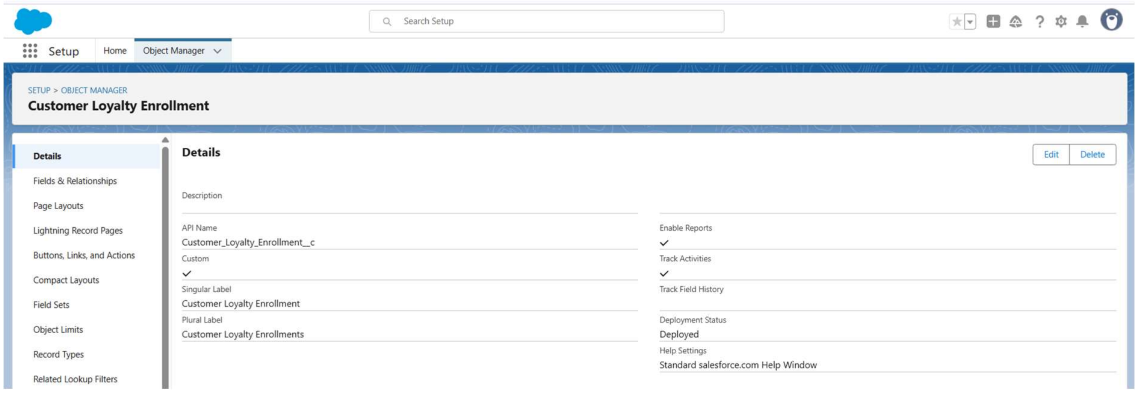
- **Master-Detail Relationship**
    - Engagement Activity → Customer Retention Data
    - (Steps: Engagement Activity → Fields & Relationships → New → Master-Detail → Related To Customer Retention Data).



- **Hierarchical Relationship**
    - Only available on User object.
    - Example: A Customer Success Manager user reports to Sales Manager user.

Step 8: Junction Objects

1. Create new custom object: **Customer Loyalty Enrollment**.
    - Record Name: Auto Number (ENR-{0000}).
2. Add two Master-Detail fields:
    - Customer Retention Data.
    - Loyalty Program (create Loyalty Program object first).
3. This junction object now allows many-to-many between customers and loyalty programs.


Search Setup
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SETUP > OBJECT MANAGER
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Edit
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Description
API Name
Customer_Loyalty_Enrollment__c
Custom
Singular Label
Customer Loyalty Enrollment
Plural Label
Customer Loyalty Enrollments
Enable Reports
Track Activities
Track Field History
Deployment Status
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Help Settings
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