Phase 3: Data Modeling & Relationships

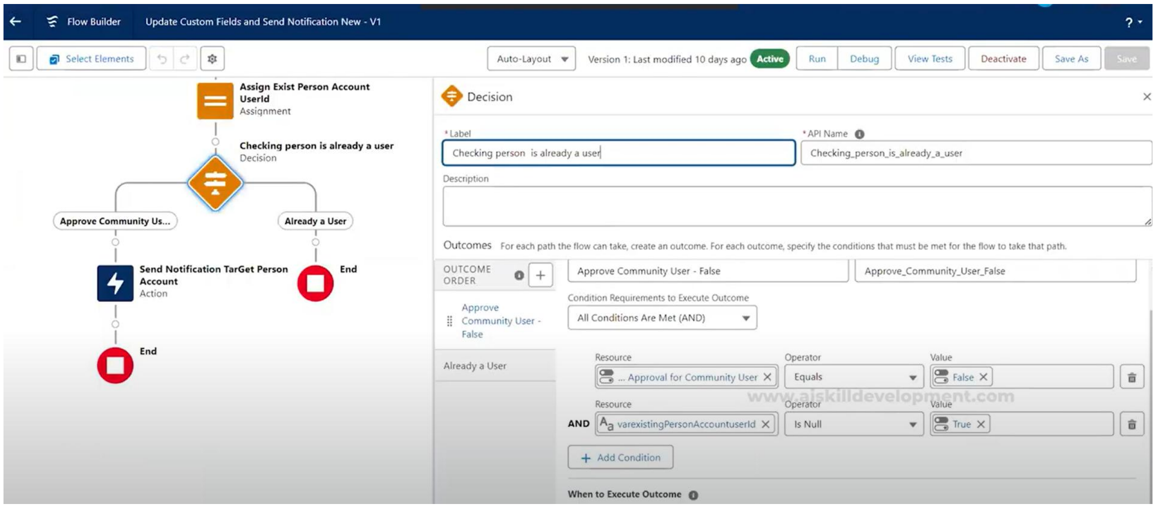
In this phase, the data model for our Salesforce project was designed using a combination of standard objects and custom objects to support business processes across Sales, Service, and Community portals.

Standard Objects

We leveraged Salesforce's core CRM objects to handle customer lifecycle management:
- Leads → to capture and qualify new prospects.
- Accounts & Contacts → to manage organizations and individual customers.
- Opportunities → to track deals, proposals, and revenue.
- Cases → to manage and resolve customer service issues.
- Knowledge Articles → to provide FAQs and documentation in the Community portal.

Custom Objects

To extend functionality beyond standard CRM, we created custom objects:
- Partner_Engagement__c → to manage interactions with partner organizations (fields: Engagement Type, Notes, Next Follow-up Date, Partner Lookup).
- Community_Post__c → to capture discussions and posts from customers/partners in the Community portal (fields: Title, Description, Posted By, Date).
- Feedback__c → to collect structured feedback from customers/partners (fields: Rating, Comments, User Lookup, Case/Opportunity Lookup).



Fields

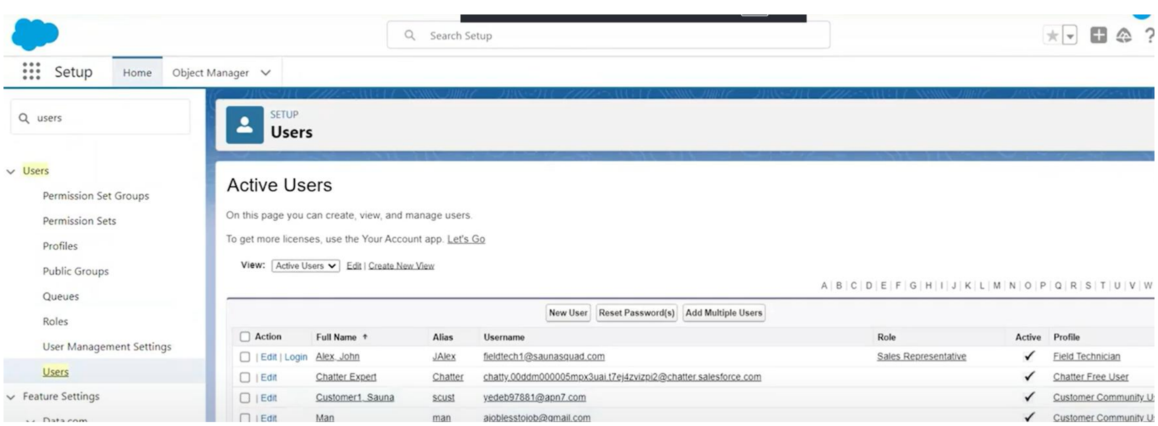
Different field types were used to capture critical business information:

- Picklists: Opportunity Stage (Prospecting, Proposal, Closed Won, Closed Lost), Case Status (New, In Progress, Resolved).
- Lookup fields: Lead → Partner, Case → Knowledge Article.
- Currency: Revenue in Opportunities, Partner contribution values.
- Date: Case Created Date, Opportunity Close Date.
- Long Text Area: Feedback comments, Community Post details.

Record Types

Record types were used to separate different business processes:

- Opportunities → Record Types for Direct Sales vs Partner Sales.
- Cases → Record Types for Customer Cases vs Partner Support Requests.
- Community Posts → Record Types for Questions vs Ideas.



Page Layouts

Custom layouts were designed for each object:

- Lead Layout → Lead Info, Source, Assigned User, Next Follow-up.
- Opportunity Layout → Stage, Expected Revenue, Products, Partner involvement.
- Case Layout → Case Details, Priority, Linked Knowledge Articles, Assigned Agent.
- Community Post Layout → Title, Content, Posted By, Comments.

Compact Layouts

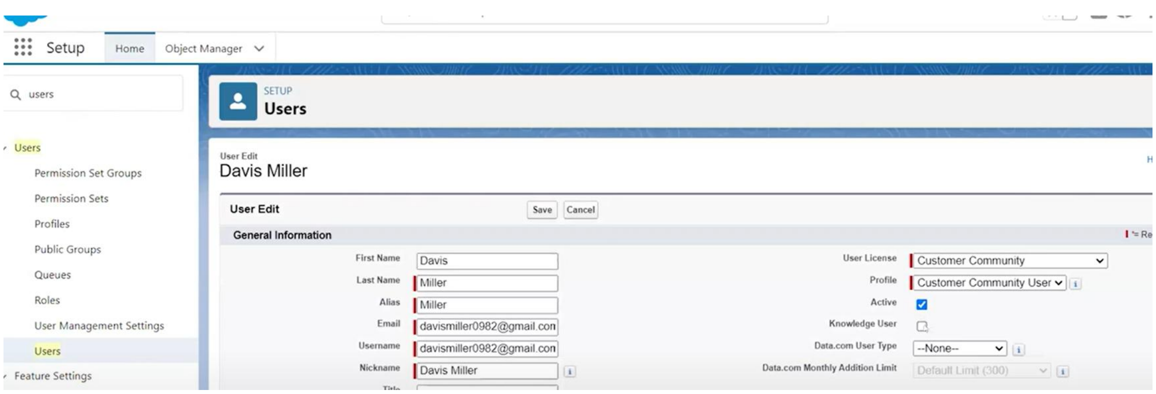
Key fields highlighted for quick visibility:

- Lead → Name, Source, Status.
- Opportunity → Name, Stage, Amount.
- Case → Case Number, Status, Priority.
- Community Post → Title, Author, Date.

Schema Builder

Salesforce Schema Builder was used to visualize relationships between standard and custom objects:

- Lead ↔ Opportunity (via conversion process).
- Account/Contact ↔ Case (1-to-many).
- Partner ↔ Partner_Engagement__c.
- Community_User ↔ Community_Post__c ↔ Feedback__c.



Lookup vs Master-Detail vs Hierarchical Relationships

- Lookup: Used widely (e.g., Case → Knowledge Article, Opportunity → Partner).
- Master-Detail: Applied in Feedback__c → Community_Post__c to maintain ownership hierarchy.
- Hierarchical: Used for User object to define reporting relationships.

Junction Objects

Not required in the current scope, but could be introduced in the future (e.g., Partner_Collaboration__c linking multiple partners to multiple opportunities).

External Objects

Not used in this phase, but Salesforce External Objects can be explored later for integrations with Payment Gateways, ERP, or external support tools.

Overall Summary

Phase 3 delivered a flexible and scalable data model, combining Salesforce’s standard CRM functionality (Leads, Accounts, Opportunities, Cases) with custom objects (Partner Engagement, Community Posts, Feedback). This extended design ensures the CRM supports sales automation, service management, and community engagement in a unified structure.