

◆ Phase 3: Data Modeling & Relationships

1. Standard Objects Used

We mapped Salesforce standard objects to EdTech business needs:

Object	Purpose in EdTech CRM	Custom Fields Added	Relationships
Lead	Captures prospective student/professional inquiries.	<ul style="list-style-type: none"> - Interested Course (Lookup → Course) - Education Level (Picklist: Undergraduate, Graduate, Professional) - Preferred Demo Date (Date) - Lead Type (Picklist: Student, Working Professional) 	Linked to Course and Demo Session.
Opportunity	Represents a qualified lead interested in a paid course.	<ul style="list-style-type: none"> - Course (Lookup → Course) - Expected Payment Date (Date) 	Linked to Course; creates Enrollment on Closed Won.
Contact	Stores details of registered students.	<ul style="list-style-type: none"> - Student Type (Picklist: Student, Professional) - Preferred Learning Mode (Picklist: Online, Hybrid, Offline) 	Linked to Enrollment; linked to Cases for support.
Account	Parent record for Contact. Used minimally as students are mostly individuals.	- Account Type (Picklist: Student, Corporate)	Contact is linked to Account (standard Salesforce).

2. Custom Objects Created

Custom Object	Purpose	Key Fields	Relationships
Course	Stores course catalog details.	<ul style="list-style-type: none"> - Category (Picklist: AI, ML, Cloud, etc.) - Price (Currency) - Duration (Number in weeks) 	Linked to Lead (Interested Course), Opportunity, and Enrollment.
Demo Session	Tracks demo/trial sessions for students.	<ul style="list-style-type: none"> - Session Date (Date/Time) - Status (Picklist: Scheduled, Attended, Missed) - Related Lead (Lookup) - Related Contact (Lookup) 	Linked to Lead before conversion, Contact after conversion.
Enrollment	Represents a student's confirmed registration.	<ul style="list-style-type: none"> - Student (Lookup → Contact) - Course (Lookup → Course) - Payment Status (Picklist: Pending, Paid) 	Created from Opportunity (Closed Won); linked to Contact and Course.

Course

SETUP > OBJECT MANAGER

Fields & Relationships				
8 Items, Sorted by Field Label				
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Category	Category__c	Picklist		
Course Name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Description	Description__c	Long Text Area(32768)		
Duration	Duration__c	Number(18, 0)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Price	Price__c	Currency(18, 0)		

DEMO SESSION

SETUP > OBJECT MANAGER

Demo Session

Fields & Relationships				
8 Items, Sorted by Field Label				
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Demo Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Related Contact	Related_Contact__c	Lookup(Contact)		✓
Related Lead	Related_Lead__c	Lookup(Lead)		✓
Session Date	Session_Date__c	Date		
Status	Status__c	Picklist		

ENROLLMENT

SETUP > OBJECT MANAGER

Enrollment

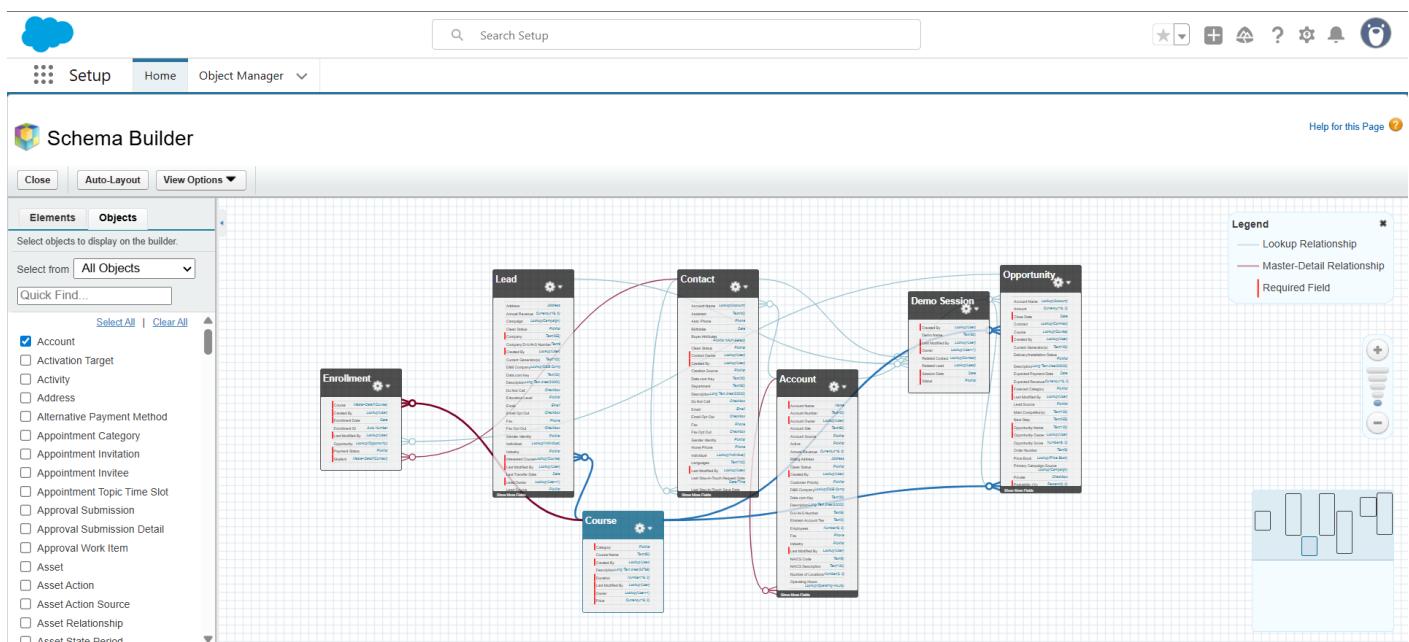
Fields & Relationships				
8 Items, Sorted by Field Label				
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Course	Course__c	Master-Detail(Course)		✓
Created By	CreatedById	Lookup(User)		
Enrollment Date	Enrollment_Date__c	Date		
Enrollment ID	Name	Auto Number		✓
Last Modified By	LastModifiedById	Lookup(User)		
Opportunity	Opportunity__c	Lookup(Opportunity)		✓
Payment Status	Payment_Status__c	Picklist		
Student	Student__c	Master-Detail(Contact)		✓

3. Relationships Defined

- Lead → Demo Session (Lookup) → A lead can attend one or more demo sessions.
- Lead → Course (Lookup) → Lead shows interest in a course.
- Lead → Opportunity (Standard Conversion).
- Opportunity → Course (Lookup) → Tracks which course the Opportunity is for.
- Opportunity → Enrollment (Auto-created on Closed Won via Apex Trigger).
- Enrollment → Contact (Lookup) → Which student enrolled.
- Enrollment → Course (Lookup) → Which course was purchased.

4. Schema Builder View

Visual relationship diagram (ERD) created using Salesforce Schema Builder:



✓ Phase 3 Outcome:

- Standard objects customized with EdTech-specific fields.
- Custom objects (Course, Demo Session, Enrollment) created.
- Relationships established between standard & custom objects.
- Schema Builder used to visualize the entire CRM data model.