

Phase 3: Data Modeling & Relationships

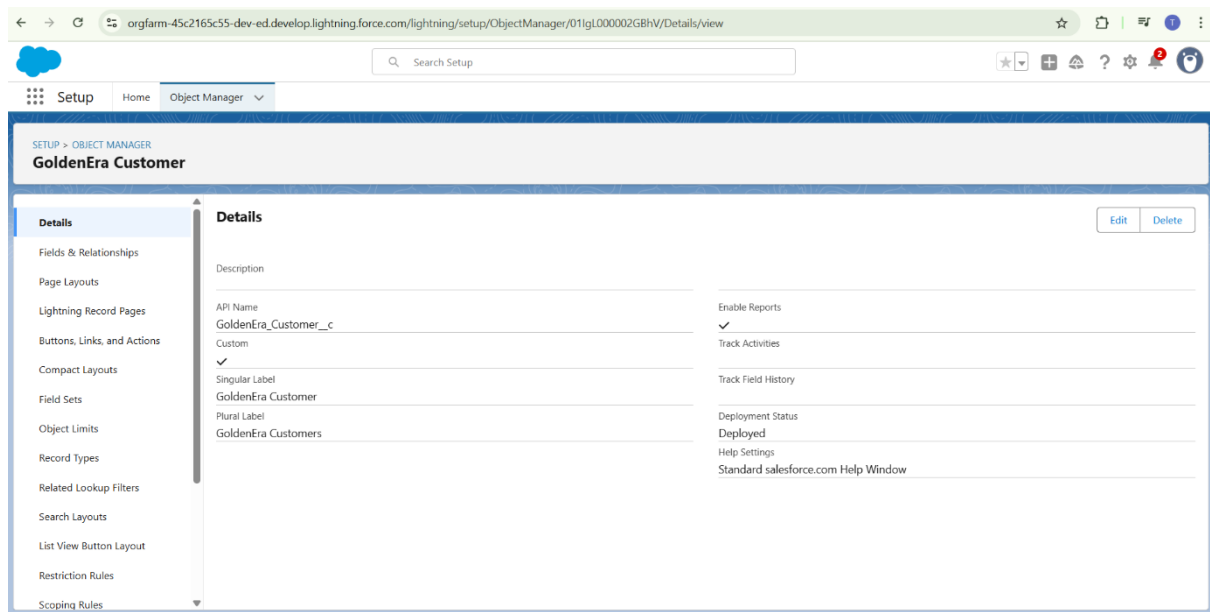
Step 1: Standard & Custom Objects

Six custom objects were created to store business-critical data:

- **GoldenEra Customer** – Stores customer details such as preferences, anniversaries, and purchase history.
- **GoldenEra Product** – Stores product catalog details such as category, material, price, and SKU.
- **GoldenEra Order** – Stores orders placed by customers, including order date, payment status, and delivery status.
- **GoldenEra Inventory** – Tracks stock availability, reorder levels, and store location.
- **GoldenEra Marketing Campaign** – Stores details of promotional campaigns such as campaign name, offers, and status.
- **GoldenEra Service Request** – Stores after-sales service requests such as repairs, resizing, cleaning, and their status.

Steps followed:

- Navigated to Setup → Object Manager → Create → Custom Object
- Provided label, name, and enabled reports/search
- Saved and created Tabs for each object



Same steps followed for all six custom object creation

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
GoldenEra Customer	GoldenEra_Customer__c	Custom Object		9/16/2025	✓
GoldenEra Inventory	GoldenEra_Inventory__c	Custom Object		9/17/2025	✓
GoldenEra Marketing Campaign	GoldenEra_Marketing_Campaign__c	Custom Object		9/17/2025	✓
GoldenEra Order	GoldenEra_Order__c	Custom Object		9/17/2025	✓
GoldenEra Product	GoldenEra_Product__c	Custom Object		9/16/2025	✓
GoldenEra Service Request	GoldenEra_Service_Request__c	Custom Object		9/17/2025	✓

Step 2: Fields

GoldenEra Customer

- **GoldenEra Customer Name** (Text, 80) – Standard Name field
- **FirstName** (Text, 60)
- **LastName** (Text, 60)
- **FullName** (Formula, Text → FirstName + LastName)
- **Email** (Email)
- **Phone** (Phone)
- **Loyalty Status** (Picklist: Gold, Silver, Bronze, Platinum)
- **Total Purchases** (Number, 18,0)
- **Owner** (Lookup → User/Group)
- **Created By** (Lookup → User)
- **Last Modified By** (Lookup → User)

<div> <input type="text" value="Search Setup"/> </div>			
<div> <div>Setup</div> <div>Home</div> <div>Object Manager</div> </div>			
<div> <div>SETUP > OBJECT MANAGER</div> <div>GoldenEra Customer</div> </div>			
<div> <div>Details</div> <div>Fields & Relationships</div> <div>Page Layouts</div> <div>Lightning Record Pages</div> <div>Buttons, Links, and Actions</div> <div>Compact Layouts</div> <div>Field Sets</div> <div>Object Limits</div> <div>Record Types</div> <div>Related Lookup Filters</div> <div>Search Layouts</div> <div>List View Button Layout</div> <div>Restriction Rules</div> <div>Scoping Rules</div> </div>	<div> <div>Fields & Relationships</div> <div>11 Items, Sorted by Field Label</div> <div> <input type="text" value="Quick Find"/> <div>New Deleted Fields Field Dependencies Set History Tracking</div> </div> </div>		
	Email	Email__c	Email
	FirstName	FirstName__c	Text(60)
	FullName	FullName__c	Formula (Text)
	GoldenEra Customer Name	Name	Text(80) ✓
	Last Modified By	LastModifiedById	Lookup(User)
	LastName	LastName__c	Text(60)
	Loyalty Status	Loyalty_Status__c	Picklist
	Owner	OwnerId	Lookup(User,Group) ✓
	Phone	Phone__c	Phone
	Total Purchases	Total_Purchases__c	Number(18, 0)

GoldenEra Product

- **GoldenEra Product Name** – Name of the jewelry product (e.g., Diamond Ring, Gold).
- **Price** – Selling price of the product.
- **SKU** – Unique identifier/code for the product.
- **Stock Quantity** – Number of items available in inventory.
- **Owner** – Salesforce user or group responsible for managing the product.
- **Created By** – User who created the product record.
- **Last Modified By** – User who last updated the product record.

<div> <input type="text" value="Search Setup"/> </div>			
<div> <div>Setup</div> <div>Home</div> <div>Object Manager</div> </div>			
<div> <div>SETUP > OBJECT MANAGER</div> <div>GoldenEra Product</div> </div>			
<div> <div>Details</div> <div>Fields & Relationships</div> <div>Page Layouts</div> <div>Lightning Record Pages</div> <div>Buttons, Links, and Actions</div> <div>Compact Layouts</div> <div>Field Sets</div> <div>Object Limits</div> <div>Record Types</div> <div>Related Lookup Filters</div> <div>Search Layouts</div> <div>List View Button Layout</div> <div>Restriction Rules</div> <div>Scoping Rules</div> </div>	<div> <div>Fields & Relationships</div> <div>7 Items, Sorted by Field Label</div> <div> <input type="text" value="Quick Find"/> <div>New Deleted Fields Field Dependencies Set History Tracking</div> </div> </div>		
	FIELD LABEL	FIELD NAME	DATA TYPE
	Created By	CreatedById	Lookup(User)
	GoldenEra Product Name	Name	Text(80) ✓
	Last Modified By	LastModifiedById	Lookup(User)
	Owner	OwnerId	Lookup(User,Group) ✓
	Price	Price__c	Currency(18, 0)
	SKU	SKU__c	Text(60)
	Stock Quantity	Stock_Quantity__c	Number(18, 0)

GoldenEra Order

- **Customer** (Lookup → GoldenEra Customer)
- **Product** (Lookup → GoldenEra Product)
- **Order Date** (Date)
- **Payment Status** (Picklist: Pending, Paid, Refunded)
- **Delivery Status** (Picklist: Pending, Shipped, Delivered)

GoldenEra Inventory

- **Product** (Lookup → GoldenEra Product)
- **Available Quantity** (Number)
- **Reorder Level** (Number)
- **Store Location** (Text)
- **Stock Status** (Formula → IF(Available_Quantity__c > Reorder_Level__c, "Available", "Low Stock"))

GoldenEra Marketing Campaign

- **Campaign Name** (Text)
- **Start Date** (Date)
- **End Date** (Date)
- **Offer Type** (Picklist: Discount %, Free Gift, Exclusive Access)
- **Campaign Status** (Picklist: Planned, Active, Completed)

GoldenEra Service Request

- **Customer** (Lookup → GoldenEra Customer)
- **Product** (Lookup → GoldenEra Product)
- **Request Type** (Picklist: Repair, Cleaning, Resizing, Engraving)
- **Request Status** (Picklist: New, In Progress, Completed)
- **Service Date** (Date)

Setup

Home

Object Manager

8 Items, Sorted by Field Label

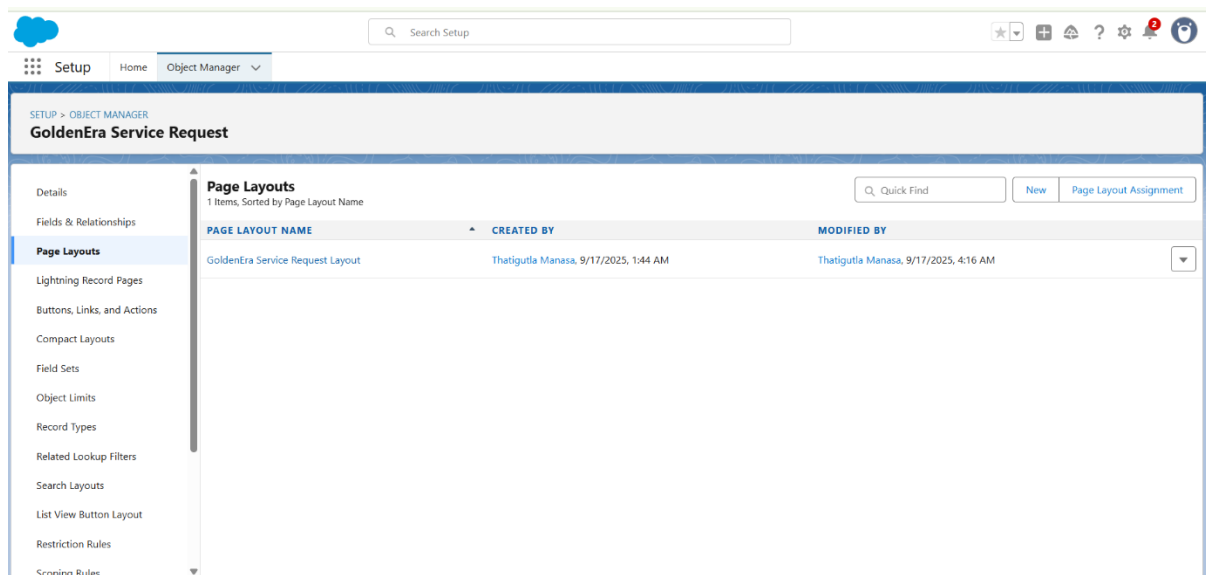
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
GoldenEra Customer	GoldenEra_Customer__c	Lookup(GoldenEra Customer)		✓
GoldenEra Product	GoldenEra_Product__c	Lookup(GoldenEra Product)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User.Group)		✓
Reason	Reason__c	Text(100)		
Request Number	Name	Auto Number		✓
Service Type	Service_Type__c	Picklist		

3. Record Types

- Used to **differentiate business processes** if needed.
- Example:
 - **GoldenEra Service Request** → Record Types: *Repair Request, Cleaning Request, Resizing Request*
 - **GoldenEra Order** → Record Types: *Online Order, In-Store Order*

4. Page Layouts

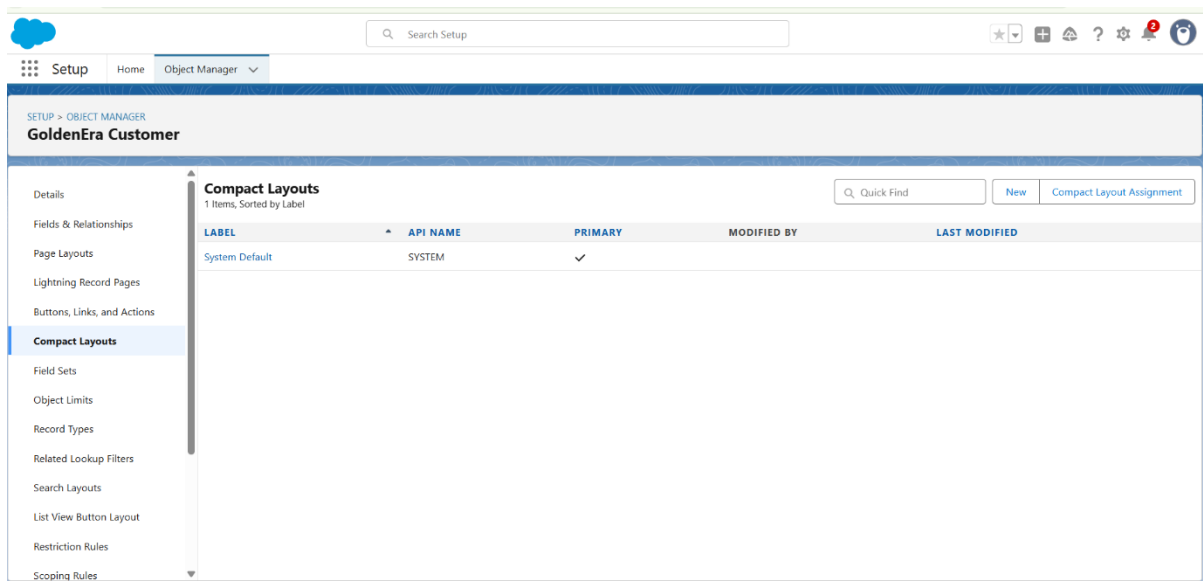
- Each object has **custom page layouts** to show only relevant fields to different users.
- Example:
 - **Sales team** sees Customer Name, Email, Phone, Orders, Total Purchases.
 - **Service team** sees Service Requests, Product details, Request Status.



5. Compact Layouts

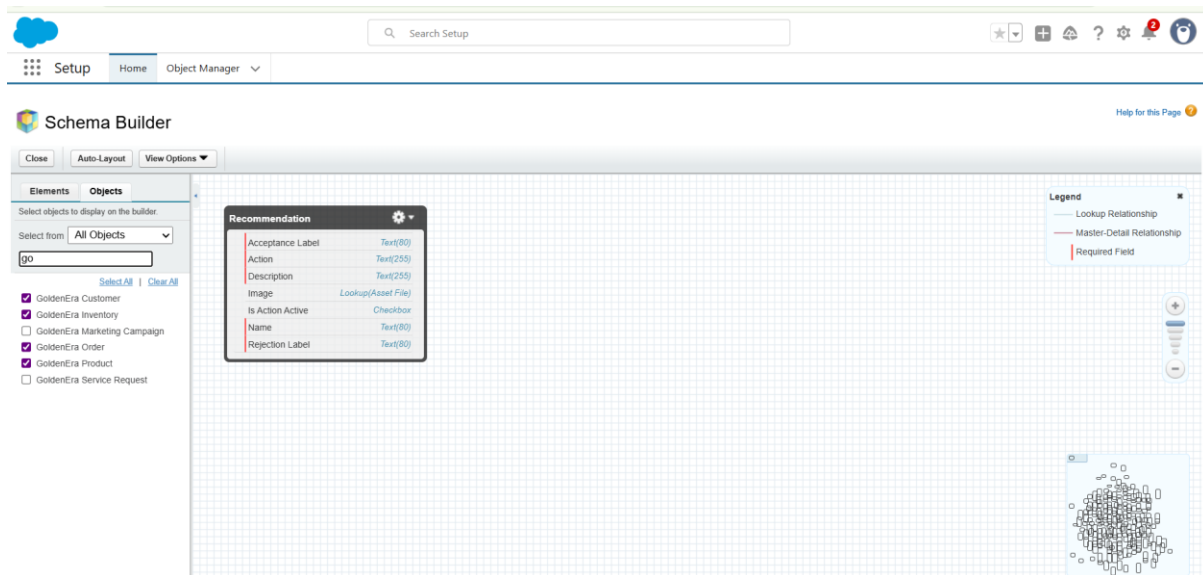
- Provides **summary info on record highlights** (used in mobile view or hover cards).
- Example:
 - **GoldenEra Customer Compact Layout:** Full Name, Email, Phone, Loyalty Status, Total Purchases.
 - **GoldenEra Product Compact Layout:** Product Name, Price, Stock Quantity.

But I used Compact Layout as System Default.



6. Schema Builder

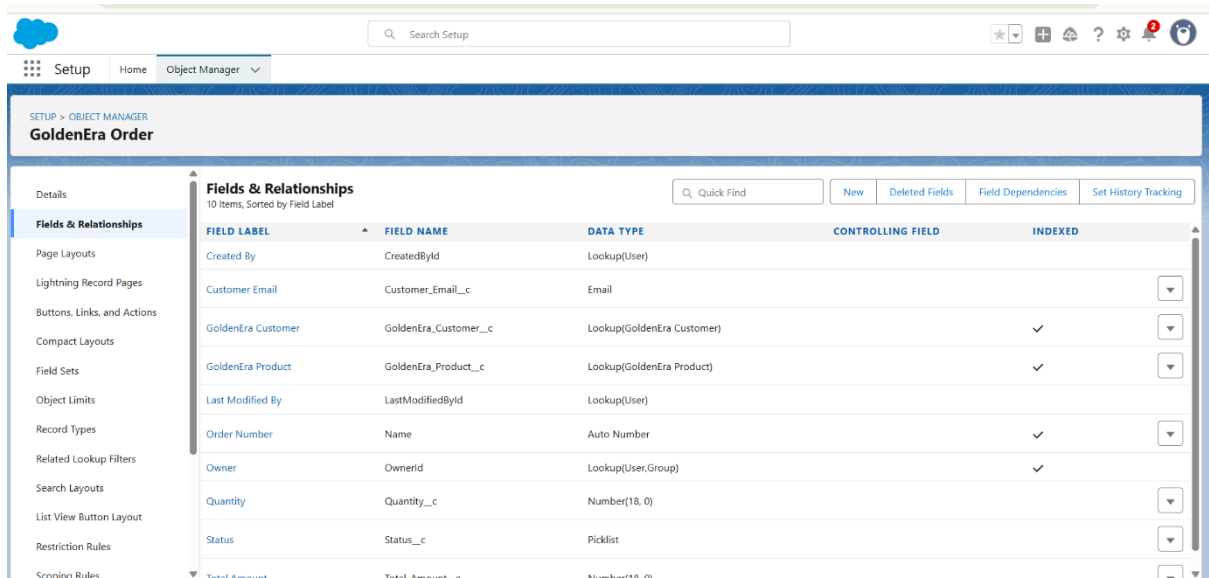
- Used to **visualize all objects and their relationships**.
- Shows **custom and standard objects**, field types, and lookup/master-detail links.
- Helps stakeholders understand **data flow and connections**.



7. Lookup vs Master-Detail vs Hierarchical Relationships

- **Lookup Relationship:**
 - Simple connection between two objects.
 - Example: GoldenEra Order → Customer
- **Master-Detail Relationship:**
 - Strong dependency, parent controls child record behavior.

- Example: GoldenEra Inventory → Product (Product is parent, Inventory is child)
- **Hierarchical Relationship:**
 - Special relationship for **User object** only.
 - Example: Manager → Employee (not used heavily in this project)



SETUP > OBJECT MANAGER
GoldenEra Order

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
Screening Rules

10 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Customer Email	Customer_Email__c	Email		
GoldenEra Customer	GoldenEra_Customer__c	Lookup(GoldenEra Customer)		✓
GoldenEra Product	GoldenEra_Product__c	Lookup(GoldenEra Product)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Order Number	Name	Auto Number		✓
Owner	OwnerId	Lookup(User,Group)		✓
Quantity	Quantity__c	Number(18, 0)		
Status	Status__c	Picklist		
Total Amount	Total_Amount__c	Number(18, 0)		

8. Junction Objects

- Used for **many-to-many relationships**.
- Example (optional for future enhancement):
 - **GoldenEra Customer ↔ GoldenEra Marketing Campaign**
 - A single customer can belong to multiple campaigns, and a campaign can target multiple customers.