Salesforce Project Implementation Phases with Concepts (Admin + Developer)

Phase 3: Data Modeling & Relationships

Standard Objects & Core Custom Objects

Account Object Configuration

Step 1: Configure Standard Account Object

Navigation: Setup → Object Manager → Account

Account will represent: Universities, Campuses, Partner Organizations

Record Types to Create:

- University Campus
- Partner Organization (for employers, vendors)

14 Custom Objects:

1. Student__c - Central hub for all student data
2. Alumni__c - Post-graduation engagement tracking
3. Program__c - Academic programs and degrees
4. Academic_Advisor__c - Advisors and counselors
5. Course__c - Individual courses and curricula
6. Student_Course_Enrollment__c - Junction for grades/enrollment
7. Event__c - University events and activities
8. Event_Participation__c - Junction for event attendance
9. Career_Opportunity__c - Jobs and internships
10. Student_Application__c - Junction for job applications
11. Support_Case__c - Student support and intervention
12. Mentorship__c - Junction for mentor-student relationships
13. Donation__c - Alumni giving and fundraising
14. External Objects - LMS and SIS integration

Engagement Channel Type	EngagementChannelType	Standard Object			
Engagement Channel Work Type	EngagementChannelWorkType	Standard Object			
Entitlement	Entitlement	Standard Object			
Entitlement Contact	EntitlementContact	Standard Object			
Event	Event	Standard Object			
Event Participation	Event_Participation__c	Custom Object	Junction object to track which students participate in which events.	9/21/2025	✓
Finance Balance Snapshot	FinanceBalanceSnapshot	Standard Object			
Finance Transaction	FinanceTransaction	Standard Object			
Fulfillment Order	FulfillmentOrder	Standard Object			
Fulfillment Order Item Adjustment	FulfillmentOrderItemAdjustment	Standard Object			
Fulfillment Order Item Tax	FulfillmentOrderItemTax	Standard Object			
Fulfillment Order Product	FulfillmentOrderLineItem	Standard Object			
Guest User Anomaly Event Store	GuestUserAnomalyEventStore	Standard Object			
Image	Image	Standard Object			

SETUP
Object Manager
106+ Items, Sorted by Label

Quick Find | Schema Builder | Create

Coupon	Coupon	Standard Object		
Course	Course__c	Custom Object	9/21/2025	✓
Credential Stuffing Event Store	CredentialStuffingEventStore	Standard Object		
Credit Memo	CreditMemo	Standard Object		
Credit Memo Invoice Application	CreditMemoInvApplication	Standard Object		
Credit Memo Line	CreditMemoLine	Standard Object		
Custom Library	DataMaskCustomValueLibrary	Standard Object		
Customer	Customer	Standard Object		
D&B Company	DandBCompany	Standard Object		
Data Kit Deployment Log	DataKitDeploymentLog	Standard Object		
Data Use Legal Basis	DataUseLegalBasis	Standard Object		
Data Use Purpose	DataUsePurpose	Standard Object		
Delivery Estimation Setup	DeliveryEstimationSetup	Standard Object		
Digital Wallet	DigitalWallet	Standard Object		
Donation	Donation__c	Custom Object	9/21/2025	✓
Duplicate Record Item	DuplicateRecordItem	Standard Object		

SETUP
Object Manager
106+ Items, Sorted by Label

Quick Find | Schema Builder | Create

Campaign	Campaign	Standard Object		
Campaign Member	CampaignMember	Standard Object		
Card Payment Method	CardPaymentMethod	Standard Object		
Career Opportunity	Career_Opportunity__c	Custom Object	9/21/2025	✓
Cart	WebCart	Standard Object		
Cart Adjustment Basis	WebCartAdjustmentBasis	Standard Object		
Cart Adjustment Group	WebCartAdjustmentGroup	Standard Object		
Cart Delivery Group	CartDeliveryGroup	Standard Object		
Cart Delivery Group Method	CartDeliveryGroupMethod	Standard Object		
Cart Delivery Group Method Adjustment	CartDeliveryGroupMethodAdj	Standard Object		
Cart Item	CartItem	Standard Object		
Cart Item Price Adjustment	CartItemPriceAdjustment	Standard Object		
Cart Tax	CartTax	Standard Object		
Cart Validation Output	CartValidationOutput	Standard Object		
Case	Case	Standard Object		
Case Related Issue	CaseRelatedIssue	Standard Object		

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Academic Advisor	Academic_Advisor__c	Custom Object		9/20/2025	✓
Academic Program	Program__c	Custom Object	Academic programs, majors, and degree information	9/20/2025	✓
Account	Account	Standard Object			
Activity	Activity	Standard Object			
Address	Address	Standard Object			
Agent Work	AgentWork	Standard Object			
Alternative Payment Method	AlternativePaymentMethod	Standard Object			
Alumni	Alumni__c	Custom Object		9/20/2025	✓
API Anomaly Event Store	ApiAnomalyEventStore	Standard Object			
Appointment Category	AppointmentCategory	Standard Object			
Appointment Invitation	AppointmentInvitation	Standard Object			
Appointment Invitee	AppointmentInvitee	Standard Object			
Appointment Topic Time Slot	AppointmentTopicTimeSlot	Standard Object			
Approval Submission	ApprovalSubmission	Standard Object			
Approval Submission Detail	ApprovalSubmissionDetail	Standard Object			

Store Buyer Group	WebStoreBuyerGroup	Standard Object				
Store Catalog	WebStoreCatalog	Standard Object				
Student	Student__c	Custom Object	Central repository for all student information	9/20/2025	✓	
Student Course Enrollment	Student_Course_Enrollment__c	Custom Object		9/21/2025	✓	
Student Job Application	Student_Job_Application__c	Custom Object		9/21/2025	✓	
Student Support Case	Student_Support_Case__c	Custom Object		9/21/2025	✓	
Task	Task	Standard Object				
Time Slot	TimeSlot	Standard Object				
University Event	University_Events__c	Custom Object		9/21/2025	✓	
User	User	Standard Object				
User Presence	UserServicePresence	Standard Object				
User Provisioning Request	UserProvisioningRequest	Standard Object				

Learning Item	LearningItem	Standard Object			
Legal Entity	LegalEntity	Standard Object			
List Email	ListEmail	Standard Object			
Location	Location	Standard Object			
Location Group	LocationGroup	Standard Object			
Location Group Assignment	LocationGroupAssignment	Standard Object			
Location Shipping Carrier Method	LocationShippingCarrierMethod	Standard Object			
Macro	Macro	Standard Object			
Mentorship Relationship	Mentorship_Relationship__c	Custom Object		9/21/2025	✓
Messaging Session	MessagingSession	Standard Object			
Messaging User	MessagingEndUser	Standard Object			
Object Milestone	EntityMilestone	Standard Object			
Operating Hours	OperatingHours	Standard Object			

Schema Builder Validation

Step 1: Access Schema Builder

Navigation: Setup → Objects and Fields → Schema Builder

What Schema Builder Shows:

- Visual representation of all objects and relationships
- Field types and relationships between objects
- Easy way to spot missing relationships or design issues

Step 2: Validate Object Relationships

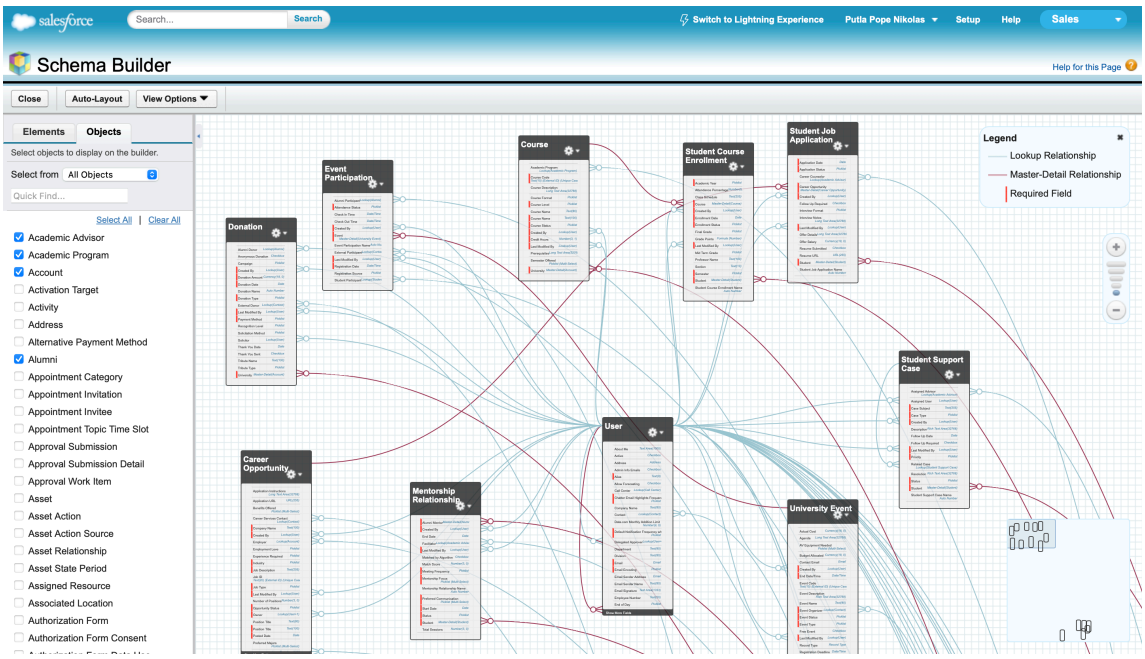
Check these key relationships exist:

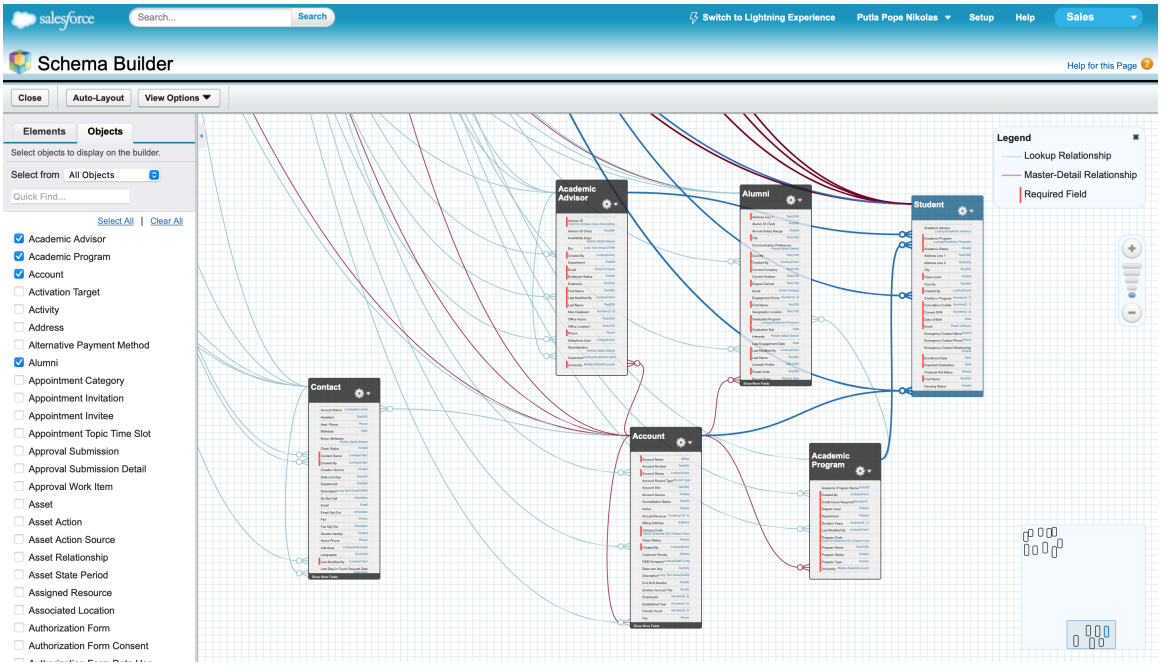
Master-Detail Relationships:

- ✅ Student__c → Account (University)
- ✅ Alumni__c → Account (University)
- ✅ Program__c → Account (University)
- ✅ Academic_Advisor__c → Account (University)
- ✅ Course__c → Account (University)
- ✅ Event__c → Account (University)
- ✅ Donation__c → Account (University)
- ✅ Support_Case__c → Student__c
- ✅ Student_Course_Enrollment__c → Student__c AND Course__c
- ✅ Event_Participation__c → Event__c
- ✅ Student_Application__c → Student__c AND Career_Opportunity__c
- ✅ Mentorship__c → Student__c AND Alumni__c

Lookup Relationships:

- ✅ Student__c → Program__c (Academic Program)
- ✅ Student__c → Academic_Advisor__c (Advisor)
- ✅ Alumni__c → Program__c (Graduated Program)
- ✅ Career_Opportunity__c → Account (Employer)
- ✅ Event_Participation__c → Student__c, Alumni__c, Contact


salesforce
Search...
Search
Switch to Lightning Experience
Putla Pope Nikolas
Setup
Help
Sales
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
Academic Advisor
Academic Program
Account
Activation Target
Activity
Address
Alternative Payment Method
Alumni
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
Donation
Event Participation
Course
Student Course Enrollment
Student Job Application
Student Support Case
Career Opportunity
Mentorship Relationship
User
University Event
Legend
Lookup Relationship
Master-Detail Relationship
Required Field


salesforce
Search...
Search
Switch to Lightning Experience
Putla Pope Nikolas
Setup
Help
Sales
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
Academic Advisor
Academic Program
Account
Activation Target
Activity
Address
Alternative Payment Method
Alumni
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
Academic Advisor
Alumni
Student
Contact
Account
Academic Program
Legend
Lookup Relationship
Master-Detail Relationship
Required Field

Record Types Configuration

Step 1: Student Record Types

Navigation: Setup → Object Manager → Student → Record Types

Record Type 1: Undergraduate Student

Record Type 2: Graduate Student

Step 2: Alumni Record Types

Record Type 1: Recent Graduate (0-5 years)

Record Type 2: Established Alumni (5+ years)

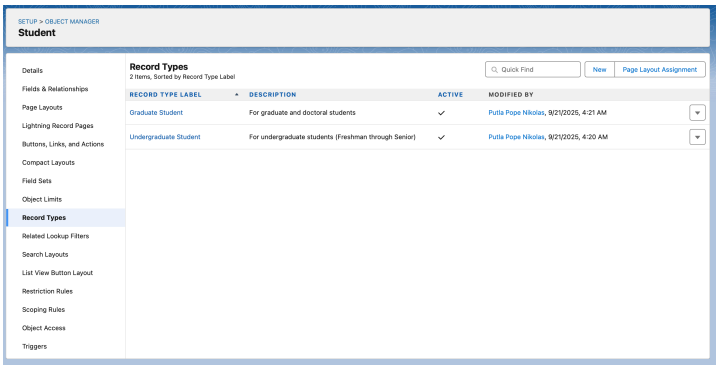
Step 3: Event Record Types

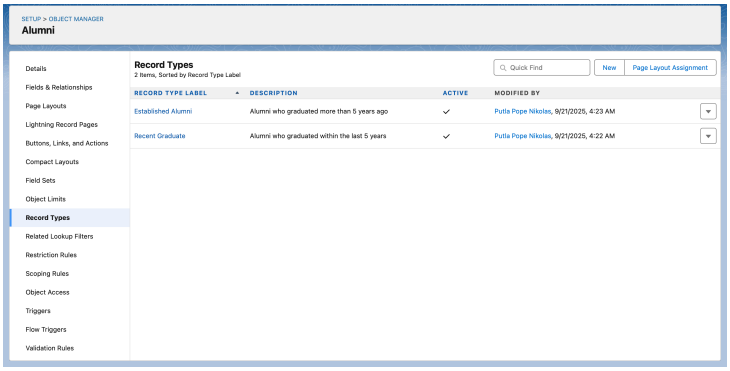
Record Type 1: Academic Event Record

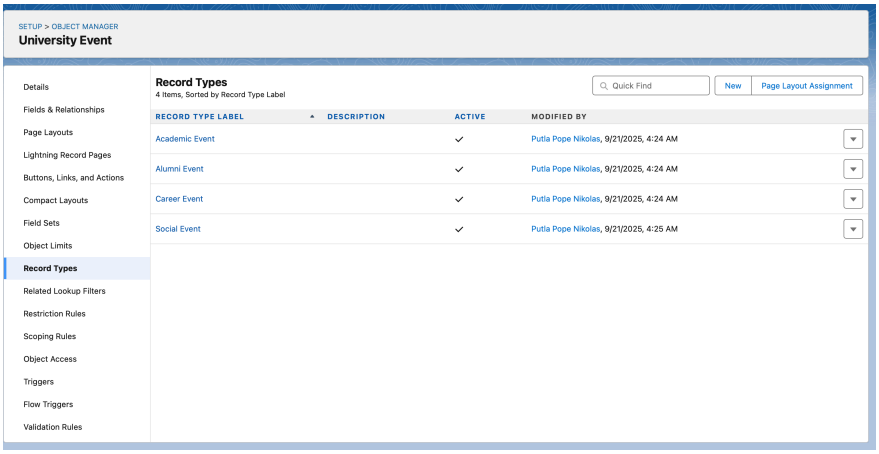
Type 2: Alumni Event Record

Type 3: Career Event Record Type 4: Social Event

Page Layouts Configuration







Student Page Layout

Navigation: Setup → Object Manager → Student → Page Layouts

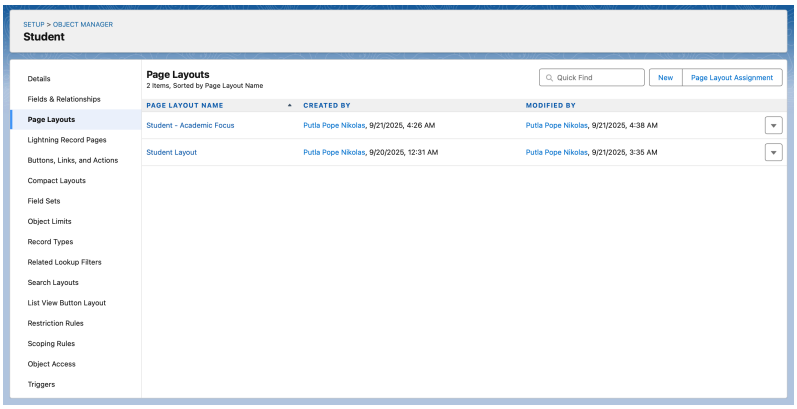
Create Layout: Student - Academic Focus

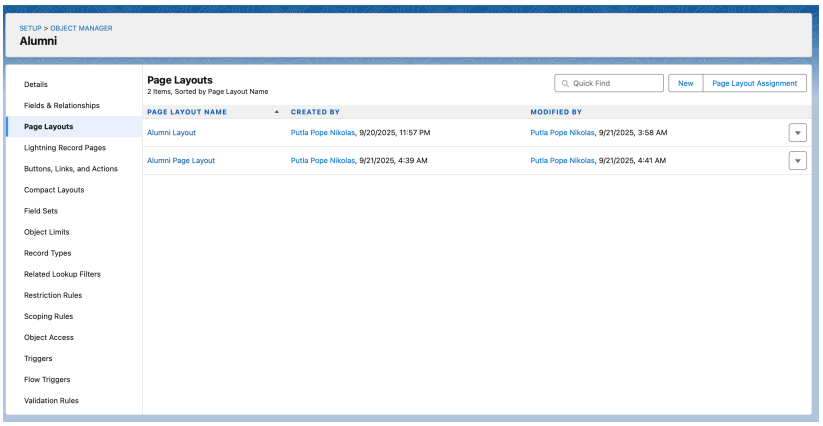
Step 2: Alumni Page Layout

Create Layout: Alumni - Engagement Focus

Step 3: Program Page Layout

Create Layout: Academic Program - Overview





Compact Layouts Configuration

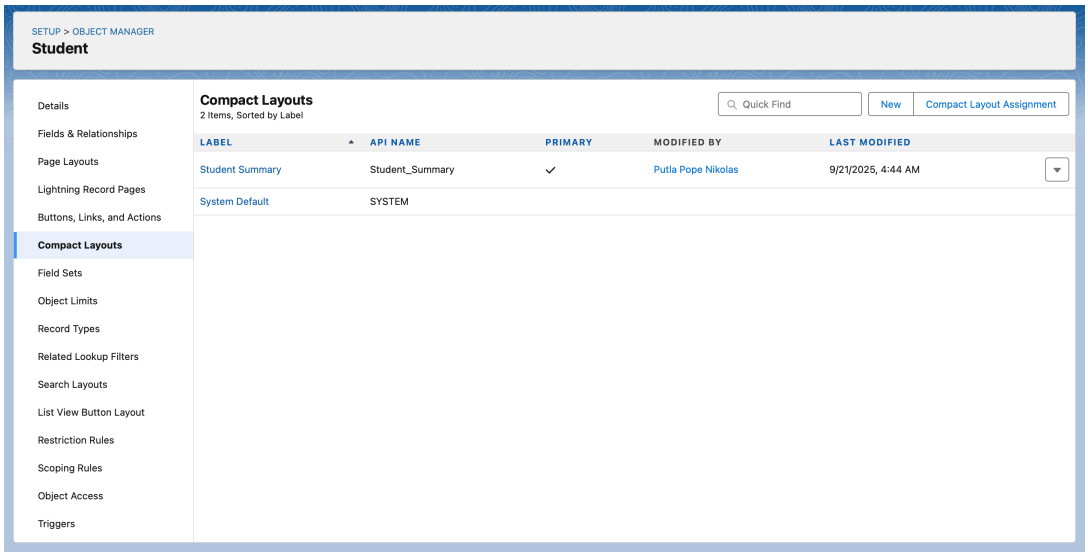
Step 1: Student Compact Layout

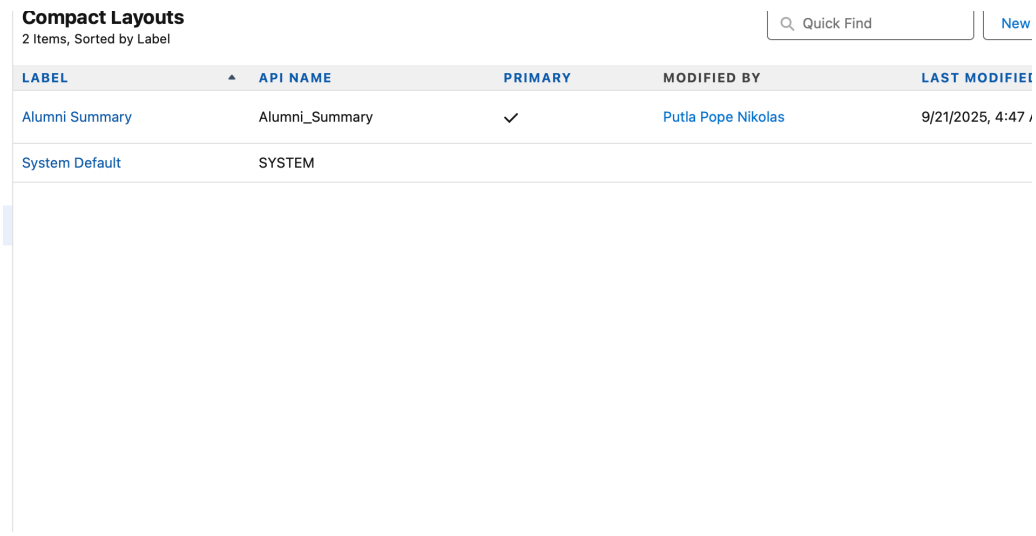
Navigation: Setup → Object Manager → Student → Compact Layouts

Create Compact Layout: Student Summary

Step 2: Alumni Compact Layout

Create Compact Layout: Alumni Summary





External Objects Setup

Step 1: LMS Integration Object

Navigation: Setup → Objects and Fields → External Objects

External Object: LMS Student Data

Step 2: SIS Integration Object

External Object: SIS Academic Records

Validation Rules Implementation

Critical Validation Rules

Rule 1: Student GPA Validation

Object: Student__c

Rule 2: Enrollment Date Logic

Object: Student__c

Rule 3: Event Date Logic

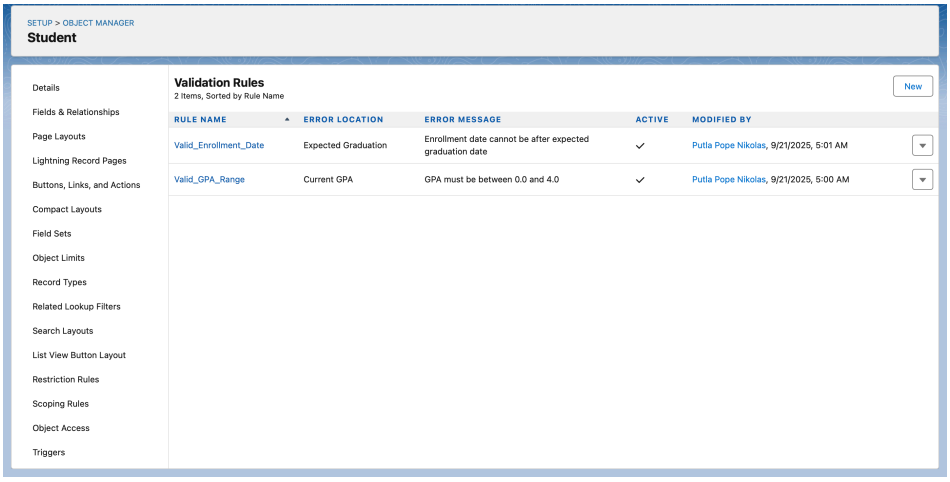
Object: Event__c

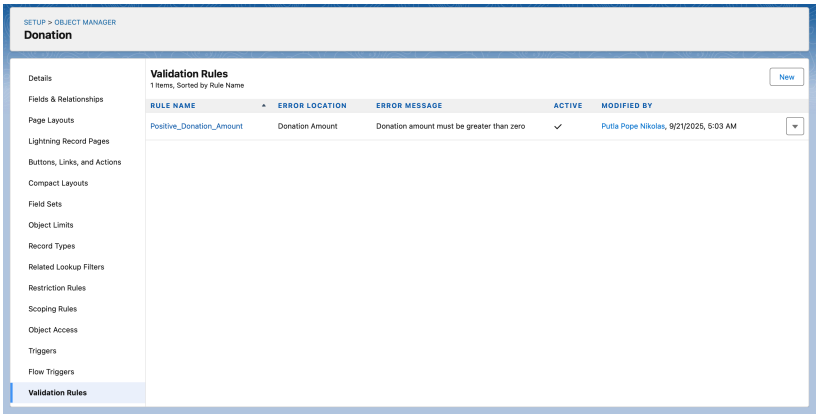
Rule 4: Donation Amount

Object: Donation__c

Rule 5: Student Course Credits

Object: Student_Course_Enrollment__c



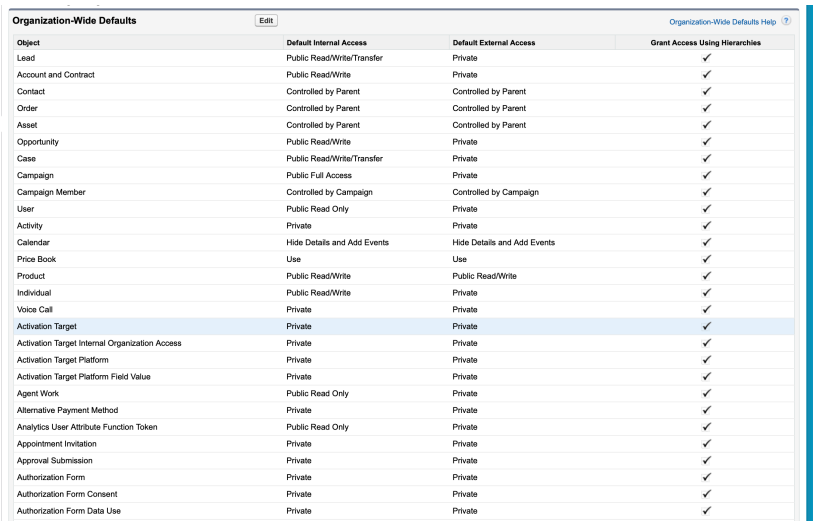


Organization-Wide Defaults (OWD) Settings

Configure OWD for Custom Objects

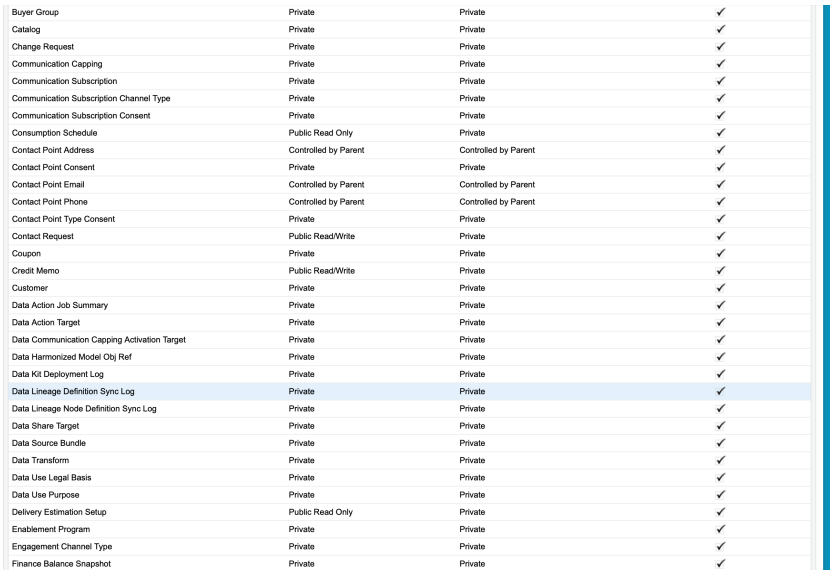
Navigation: Setup → Security → Sharing Settings

Custom Object Sharing Settings:



Organization-Wide Defaults | Edit | Organization-Wide Defaults Help

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	✓
Account and Contract	Public Read/Write	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Order	Controlled by Parent	Controlled by Parent	✓
Asset	Controlled by Parent	Controlled by Parent	✓
Opportunity	Public Read/Write	Private	✓
Case	Public Read/Write/Transfer	Private	✓
Campaign	Public Full Access	Private	✓
Campaign Member	Controlled by Campaign	Controlled by Campaign	✓
User	Public Read Only	Private	✓
Activity	Private	Private	✓
Calendar	Hide Details and Add Events	Hide Details and Add Events	✓
Price Book	Use	Use	✓
Product	Public Read/Write	Public Read/Write	✓
Individual	Public Read/Write	Private	✓
Voice Call	Private	Private	✓
Activation Target	Private	Private	✓
Activation Target Internal Organization Access	Private	Private	✓
Activation Target Platform	Private	Private	✓
Activation Target Platform Field Value	Private	Private	✓
Agent Work	Public Read Only	Private	✓
Alternative Payment Method	Private	Private	✓
Analytics User Attribute Function Token	Public Read Only	Private	✓
Appointment Invitation	Private	Private	✓
Approval Submission	Private	Private	✓
Authorization Form	Private	Private	✓
Authorization Form Consent	Private	Private	✓
Authorization Form Data Use	Private	Private	✓



Buyer Group	Private	Private	✓
Catalog	Private	Private	✓
Change Request	Private	Private	✓
Communication Capping	Private	Private	✓
Communication Subscription	Private	Private	✓
Communication Subscription Channel Type	Private	Private	✓
Communication Subscription Consent	Private	Private	✓
Consumption Schedule	Public Read Only	Private	✓
Contact Point Address	Controlled by Parent	Controlled by Parent	✓
Contact Point Consent	Private	Private	✓
Contact Point Email	Controlled by Parent	Controlled by Parent	✓
Contact Point Phone	Controlled by Parent	Controlled by Parent	✓
Contact Point Type Consent	Private	Private	✓
Contact Request	Public Read/Write	Private	✓
Coupon	Private	Private	✓
Credit Memo	Public Read/Write	Private	✓
Customer	Private	Private	✓
Data Action Job Summary	Private	Private	✓
Data Action Target	Private	Private	✓
Data Communication Capping Activation Target	Private	Private	✓
Data Harmonized Model Obj Ref	Private	Private	✓
Data Kit Deployment Log	Private	Private	✓
Data Lineage Definition Sync Log	Private	Private	✓
Data Lineage Node Definition Sync Log	Private	Private	✓
Data Share Target	Private	Private	✓
Data Source Bundle	Private	Private	✓
Data Transform	Private	Private	✓
Data Use Legal Basis	Private	Private	✓
Data Use Purpose	Private	Private	✓
Delivery Estimation Setup	Public Read Only	Private	✓
Enablement Program	Private	Private	✓
Engagement Channel Type	Private	Private	✓
Finance Balance Snapshot	Private	Private	✓

Fulfillment Order	Public Read/Write	Private	✓
Image	Private	Private	✓
Incident	Private	Private	✓
Inventory Reservation	Public Read/Write	Private	✓
Invoice	Public Read/Write	Private	✓
Legal Entity	Private	Private	✓
List Email	Private	Private	✓
Location	Public Read/Write	Private	✓
Location Group	Public Read/Write	Private	✓
Location Shipping Carrier Method	Public Read Only	Private	✓
Macro	Private	Private	✓
Macro Usage	Private	Private	✓
Messaging Session	Public Read/Write	Private	✓
Messaging User	Public Read/Write	Private	✓
Model	Private	Private	✓
Operating Hours	Public Read/Write	Private	✓
Orchestration Run	Private	Private	✓
Orchestration Stage Run	Private	Private	✓
Orchestration Step Run	Private	Private	✓
Orchestration Work Item	Private	Private	✓
Party Consent	Private	Private	✓
Pending Service Routing	Public Read Only	Private	✓
Privacy RTBF Request	Private	Private	✓
Problem	Private	Private	✓
Process Exception	Private	Private	✓
Promotion	Private	Private	✓
Promotion Line Item Rule	Private	Private	✓
Promotion Segment	Private	Private	✓
Query Editor	Private	Private	✓
Queue	Public Read/Write	Private	✓
Queued Party	Public Read/Write	Private	✓
Queue Messaging Template	Public Read/Write	Private	✓

Service Appointment Attendee	Private	Private	✓
Service Contract	Private	Private	✓
Service Resource	Public Read/Write	Private	✓
Service Territory	Public Read/Write	Private	✓
Shift	Private	Private	✓
Shipment	Private	Private	✓
Shipping Carrier	Public Read Only	Private	✓
Shipping Carrier Method	Public Read Only	Private	✓
Shipping Configuration Set	Public Read Only	Private	✓
Streaming Channel	Public Read/Write	Private	✓
Tableau Host Mapping	Public Read Only	Private	✓
User Presence	Public Read Only	Private	✓
User Provisioning Request	Private	Private	✓
Waitlist	Private	Private	✓
Web Cart Document	Private	Private	✓
Work Order	Private	Private	✓
Work Plan	Private	Private	✓
Work Plan Template	Private	Private	✓
Work Step Template	Private	Private	✓
Work Type	Private	Private	✓
Work Type Group	Public Read/Write	Private	✓
Academic Advisor	Controlled by Parent	Controlled by Parent	
Academic Program	Controlled by Parent	Controlled by Parent	
Alumni	Controlled by Parent	Controlled by Parent	
Career Opportunity	Public Read/Write	Private	✓
Course	Controlled by Parent	Controlled by Parent	
Donation	Controlled by Parent	Controlled by Parent	
Event Participation	Controlled by Parent	Controlled by Parent	
Mentorship Relationship	Controlled by Parent	Controlled by Parent	
Student	Public Read/Write	Private	✓
Student Course Enrollment	Controlled by Parent	Controlled by Parent	
Student Job Application	Controlled by Parent	Controlled by Parent	
Student Support Case	Controlled by Parent	Controlled by Parent	

Sharing Rules Configuration

Implement Sharing Rules

Sharing Rule 1: Academic Support Access

Object: Student__c

Sharing Rule 2: Alumni Engagement by Graduation Year

Object: Alumni__c

Sharing Rule 3: Career Services Program Access

Object: Student__c

Sharing Rule 4: Financial Aid Case Access

Object: Support_Case__c

Data Quality & Duplicate Management

Configure Duplicate Rules

Duplicate Rule 1: Student Records

Navigation: Setup → Data → Duplicate Management → Duplicate Rules

Duplicate Rule 2: Alumni Records

Testing & Quality Assurance

Create Test Data

Step 1: Create Test University Account

Step 2: Create Test Academic Programs

Step 3: Create Test Students (10 records)
Step 4: Create Test Alumni (5 records)

Relationship Testing

Test Scenario 1: Student-Course Enrollment

1. Create test course (CSCI-101: Introduction to Programming)
2. Create enrollment record linking student to course
3. Verify relationship displays correctly
4. Test grade calculation formulas

Test Scenario 2: Alumni-Student Mentorship

1. Create mentorship record between test alumni and student
2. Verify both sides show the relationship
3. Test status updates and tracking fields

Test Scenario 3: Event Registration

1. Create test event (Career Fair 2025)
2. Create participation records for multiple students/alumni
3. Test capacity limits and registration logic
4. Verify roll-up summaries update correctly

User Acceptance Testing

UAT Scenario 1: Academic Advisor Workflow

1. Log in as Academic Advisor
2. Search for at-risk student (Risk_Level__c = "High")
3. Create support case for intervention
4. Verify access permissions work correctly

UAT Scenario 2: Career Services Workflow

1. Log in as Career Counselor
2. Create career opportunity
3. Help student create application
4. Track application status updates

UAT Scenario 3: Alumni Relations WorkflowLog in as Alumni Relations Officer

5. Search for recent graduates
6. Create alumni engagement event
7. Track event participation

Create User Guides:

- Admin Guide: Object management, field updates, relationship maintenance
- End User Guide: Navigation, data entry, reporting basics
- Integration Guide: External system connection points