**📌 Phase 3: Data Modeling & Relationships**

In this phase, the BizConnect360 data model was designed using both **standard and custom objects**.

* **Standard Objects:** Accounts, Contacts, Leads, Opportunities, and Cases were utilized. These form the backbone of CRM functionality.
* **Custom Objects:** We created three key custom objects to extend Salesforce:
  + **Invoice\_\_c** → to manage invoices (fields: Amount, Due Date, Status, Payment Ref, Account & Opportunity lookup).
  + **Field\_Visit\_\_c** → to track agent visits (fields: Visit Date, Status, GPS Location, Agent [User lookup], Opportunity lookup).
  + **Feedback\_\_c** → to capture customer feedback (fields: Rating, Comments, Sentiment, Account & Opportunity lookup).
* **Fields:** Multiple field types were used: Currency, Date/Time, Picklists (e.g., Invoice Status = Pending/Paid/Overdue), Lookup fields, and Long Text areas for feedback comments.
* **Record Types:** Record Types can be created to differentiate business processes (e.g., *B2B Invoice* vs *B2C Invoice*) with different page layouts.
* **Page Layouts:** Customized layouts were created for each object to organize fields (e.g., Invoice layout shows Amount, Status, Due Date, Payment Reference clearly).
* **Compact Layouts:** Key fields like Amount, Status, and Due Date were added to compact layouts for quick visibility in record headers.
* **Schema Builder:** Salesforce Schema Builder was used to visualize relationships among objects like Account ↔ Invoice, Opportunity ↔ Field Visit, and Account ↔ Feedback.
* **Lookup vs Master-Detail vs Hierarchical Relationships:**
  + Lookups were mainly used (e.g., Invoice → Opportunity, Feedback → Account).
  + Master-Detail was not required, as independent record ownership and sharing were needed.
  + Hierarchical relationship applies only to User object and was not required here.
* **Junction Objects:** Could be used if many-to-many relationships were required (e.g., linking multiple Agents to multiple Field Visits), but for our current scope, simple lookups were sufficient.
* **External Objects:** Not used in this project, but Salesforce allows integration with external systems (useful for future extensions like ERP integration).

👉 Phase-3 delivered a **scalable and logical data model** where standard CRM entities (Leads, Opportunities, Accounts) were extended with custom business entities (Invoices, Field Visits, Feedback).