

Title: Integrated Sales and Service Management System

Phase 3: Data Modeling & Relationships

Objective:

To create and configure standard and custom objects, fields, record types, page layouts, and relationships in Salesforce. This phase ensures proper data structure, visibility, and access control.

1. Standard & Custom Objects

Objects in Salesforce are like tables in a database. They store records (rows) and fields (columns).

In Phase 3, we use both Standard Objects (already available in Salesforce) and Custom Objects (created to meet project-specific requirements).

Object Name	Type	Description
Account	Standard	Represents a company or organization.
Contact	Standard	Represents individuals associated with accounts.
Opportunity	Standard	Tracks sales deals.
Case	Standard	Used to track customer issues or requests.
Product	Standard	Items or services sold to customers.
Account Product	Custom	Junction object linking Account ↔ Product.
Feedback	Custom	Tracks customer feedback linked to Cases.

SETUP

Object Manager

2 Items. Sorted by Label

LABEL	API NAME	TYPE
Account	Account	Standard Object
Account Product	Account_Product__c	Custom Object

SETUP > OBJECT MANAGER

Contact

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

Details

Description

API Name

Contact

Custom

Singular Label

Contact

Plural Label

Contacts

SETUP > OBJECT MANAGER

Product

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Details

Description

API Name

Product__c

Custom

✓

Singular Label

Product

Plural Label

Products

SETUP > OBJECT MANAGER

Feedback

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Object Access

Details

Description

API Name

Feedback__c

Custom

✓

Singular Label

Feedback

Plural Label

Feedbacks

Setup

Home

Object Manager

SETUP > OBJECT MANAGER

Case

Details

Fields & Relationships

Case Page Layouts

Case Close Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Details

Description

API Name

Case

Custom

Singular Label

Case

Plural Label

Cases

SETUP > OBJECT MANAGER

Opportunity

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

Scoping Rules

Details

Description

API Name

Opportunity

Custom

Singular Label

Opportunity

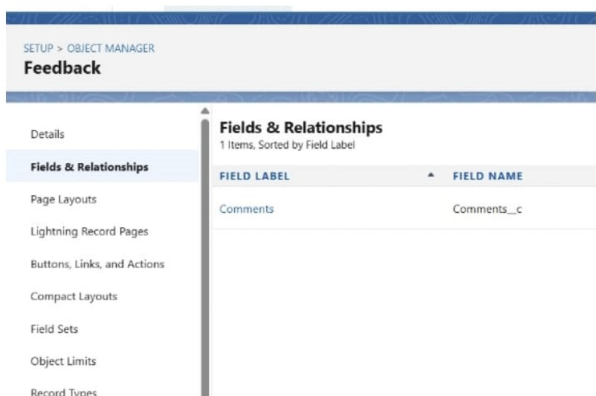
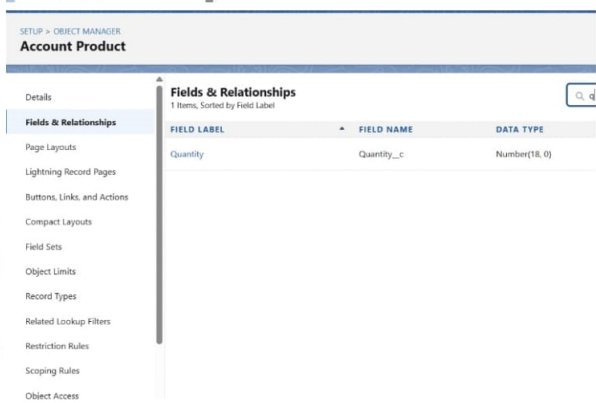
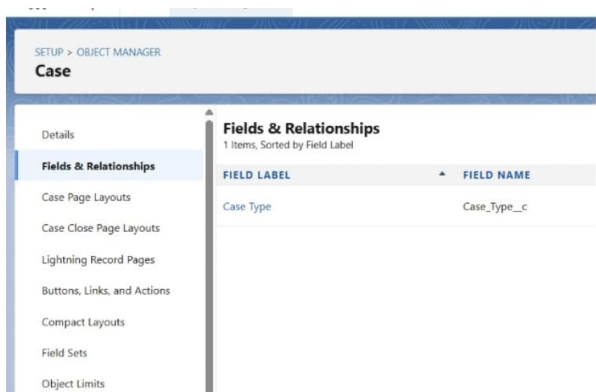
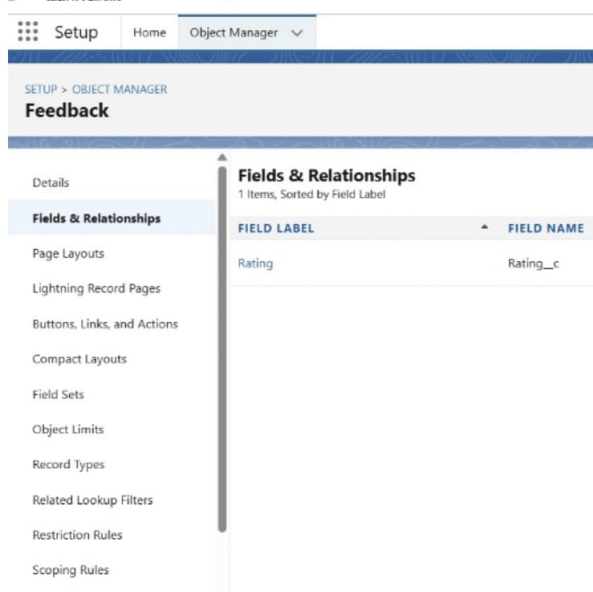
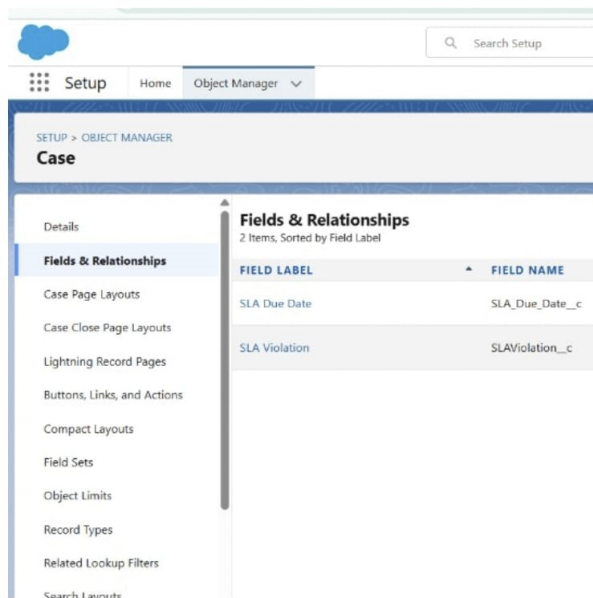
Plural Label

Opportunities

2. Custom Fields

Example Custom Fields Created:

Object	Field Name	Type	Description
Case	SLA Due Date	Date/Time	Expected resolution time.
Case	Case Type	Picklist	Category of case (Web, Email, etc.)
Account Product	Quantity	Number	Number of products linked to Account
Feedback	Rating	Number	Customer rating (1–5).
Feedback	Comments	Long Text	Customer comments.



Profiles & Permissions (Object-Level Security)

- Sales Team Profile → Read-only access to Cases.
- Support Team Profile → Read-only access to Opportunities.
- Full access to their own objects (Sales → Leads & Opportunities; Support → Cases & Feedback).

3. Record Types

Purpose: Allows Cases to have different layouts depending on type (Web vs Email).

Steps:

1. **Setup** → Object Manager → Case → Record Types → New.
2. Clone an existing Record Type or create from scratch.
3. **Enter Name:**
 - Web Case
 - Email Case
4. **Assign profiles:**
 - Support User → can create/edit
 - Sales User → view-only
5. Configure picklist values as required for each record type.

The screenshot shows the Salesforce Setup interface for Case Record Types. The breadcrumb trail is: SETUP > OBJECT MANAGER > Case. The left sidebar contains a list of setup options: Details, Fields & Relationships, Case Page Layouts, Case Close Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types (highlighted), Related Lookup Filters, Search Layouts, and List View Button Layout. The main content area is titled 'Record Types' and shows '4 Items, Sorted by Record Type Label'. It contains a table with the following data:

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
Billing Case		✓	Ramya Sree Pappireddy, 9/23/2025, 6:08 AM
External Support Case		✓	Ramya Sree Pappireddy, 9/23/2025, 5:46 AM
Internal Support Case		✓	Ramya Sree Pappireddy, 9/23/2025, 5:46 AM
Technical Case		✓	Ramya Sree Pappireddy, 9/23/2025, 6:26 AM

At the top right of the table, there is a 'Quick Find' search bar and two buttons: 'New' and 'Page Layout Assignment'.

4. Page Layouts & Compact Layouts

Steps:

A. Page Layouts for Case

1. Navigate to:
Setup → Object Manager → Case → Page Layouts.
2. Create or edit two layouts to match the Case Record Types created earlier:
 - **Web Case Layout**
 - **Email Case Layout**
3. Customize the layouts by dragging and dropping fields and related lists.
 - **Web Case Layout:** Includes fields required for cases created via the web (e.g., Contact Name, Account Name, Status, Priority, SLA Due Date).
 - **Email Case Layout:** Includes fields required for email-based cases (e.g., Subject, Description, Status, Priority, SLA Due Date).

B. Add Related Lists to Case Layout

On both layouts, ensure the following **related lists** are added:

- **Contacts** → to link cases with the customer who reported it.
- **Account Products** → to show which products are linked to the account associated with the case.
- **Feedback** → to capture customer feedback for the case.

This makes the Case record a **central hub**, connecting Accounts, Contacts, Products, and Feedback.

C. Compact Layout for Case

1. Navigate to:
Setup → Object Manager → Case → Compact Layouts.
2. Create a new Compact Layout (e.g., *Case Compact Layout*).
3. Select the most important fields to display in the highlights panel:
 - **Case Number** → Unique ID for the case.
 - **Status** → Current progress of the case (e.g., New, In Progress, Closed).
 - **Priority** → Indicates urgency (e.g., High, Medium, Low).
 - **SLA Due Date** → Deadline by which the case must be resolved.
4. Assign this compact layout as the **Primary Compact Layout** for the Case object.

D. Tab Visibility

- Added **Product (custom)** and **Feedback** tabs to the **Sales app** navigation bar.
- **Sales Team Profile** → Product tab set to *Default On*.
- **Support Team Profile** → Feedback tab set to *Default On*.
- Ensures each team can easily access their main objects.

Q tabs

User Interface

Rename Tabs and Labels

Tabs

Didn't find what you're looking for?
Try using Global Search.

SETUP
Tabs

Custom Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Custom Object Tabs		New	What Is This?
Action	Label	Tab Style	Description
Edit Del	Account Products	Box	
Edit Del	Complaints	Laptop	
Edit Del	Dealers	Books	
Edit Del	Feedbacks	Computer	
Edit Del	Products	Stopwatch	
Edit Del	Service Requests	Mail	
Edit Del	Vehicles1	Track	

Web Tabs

New

What Is This?

No Web Tabs have been defined

Visualforce Tabs

New

What Is This?

Setup

Home

Object Manager

Search Setup

SETUP > OBJECT MANAGER

Case

Details

Fields & Relationships

Case Page Layouts

Case Close 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

SaveQuick SavePreview As...CancelUndoRedoLayout Properties

ButtonsCustom LinksQuick ActionsMobile & Lightning ActionsExpanded LookupsRelated ListsReport Charts

Quick Find

Related List Name

Activity HistoryCase HistoryContact RolesFilesMessaging SessionsApproval HistoryCase MilestonesContent DeliveriesFollowersOpen ActivitiesAttachmentsCase Related IssuesEmailsGroupsRelated CasesCase CommentsCase TeamFeedbacksMerged CasesRelated Change Re...

Related Lists

Solutions

Solution Title	Solution Number	Status
Sample Text	GEN-2004-001234	Sample Text

Open Activities

Subject	Name	Task	New Task	New Event	Status
			Due Date		
Sample Text	Sample Text	✓	9/24/2025, 1:19 AM		Sample Text

Activity History

Subject	Name	Task	Due Date	Assigned To
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Setup

Home

Object Manager

SETUP > OBJECT MANAGER

Case

Details

Fields & Relationships

Case Page Layouts

Case Close 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

Case Compact Layout

Case Compact Layout

< Back to Case Compact Layouts

Compact Layout Detail

EditCloneDeleteCompact Layout Assignment

Label	Case Compact Layout
API Name	Case_Compact_Layout
Included Fields	Subject Status Customer Priority SLA Due Date
Created By	Ramya Sree Pappireddy, 9/23/2025, 7:08 AM

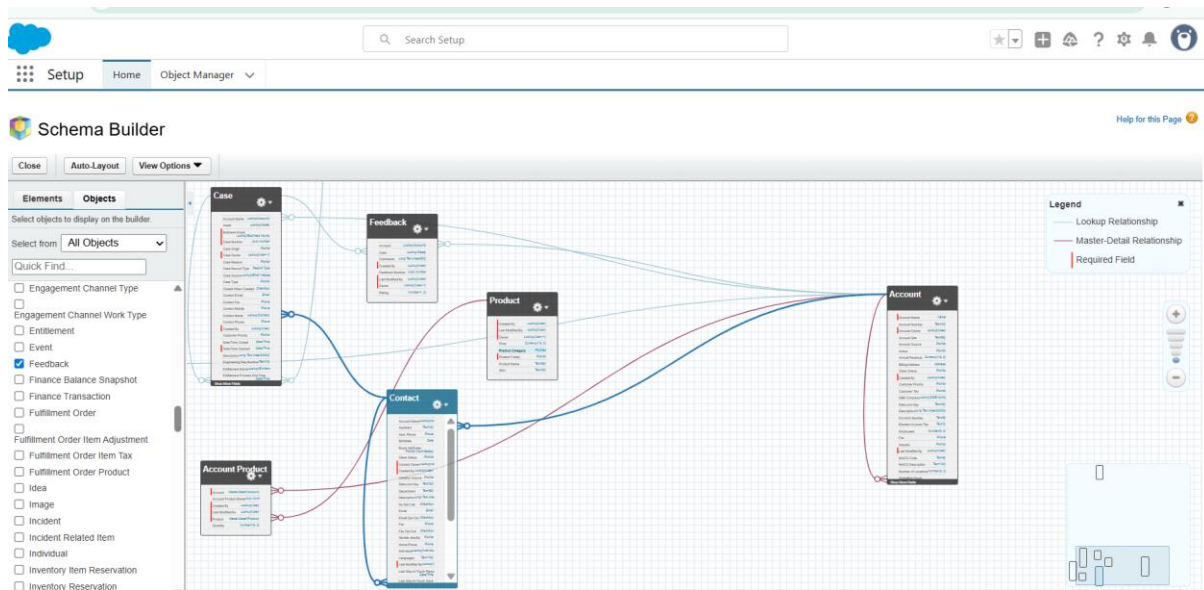
EditCloneDeleteCompact Layout Assignment

5. Schema Builder

Purpose: Visual representation of objects and relationships.

Steps:

1. Go to **Setup** → **Schema Builder**.
2. Select objects: Account, Contact, Opportunity, Case, Product, Account Product, Feedback.
3. Arrange objects to show relationships:
 - Account → Contacts (Lookup)
 - Account → Opportunities (Lookup)
 - Account → Cases (Lookup)
 - Account ↔ Product via Account Product (Junction Object)
 - Case → Feedback (Lookup)



6. Relationships

Relationship Type	Example	Notes
Lookup	Case → Account	Optional relationship, allows linking without controlling ownership.
Master-Detail	Account Product → Account	Record ownership controlled by parent; cascade delete applies.
Junction Object	Account Product	Links many Accounts to many Products.
Hierarchical	User → Manager	Optional; used for reporting structure in User object.

7. Role-Based Visibility Testing

Purpose: Ensure users see records based on profiles, sharing rules, and FLS.

Steps:

- **Sales User:**
 - Login → Go to Cases → should see **read-only** cases.
 - Try editing → should **not allow changes**.

Q users

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Didn't find what you're looking for?
Try using Global Search.

SETUP
Users

All Users

On this page you can create, view, and manage users.
To get more licenses, use the Your Account app. [Let's Go](#)

View: All Users Edit Create New View

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Action	Full Name ↑	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit Login	Sales_Rep	srep	salesrep@yourcompany.com.dev	Sales Rep	✓	Sales Team Profile
<input type="checkbox"/> Edit Login	Support_Agent	sagen	supportagent@yourcompany.com.dev	Support Agent	✓	Support Team Profile

New User Reset Password(s) Add Multiple Users

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Logged in as Rep Sales (salesrep@yourcompany.com.dev) Log out as Rep Sales

Search...

Sales app Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter Groups Cases More

Case

+ Follow View Case Hierarchy Printable View Edit Labels

Status New Customer Priority SLA Due Date

Feed Related

Post Poll

Share an update... Share

Most Recent Activity Search this feed...

All Updates Call Logs Text Posts Status Changes

Ramya Sree Pappireddy September 21, 2025 at 1:07 AM

Details

Case Owner Agent Support	Status New
Case Number 00001027	Priority High
Contact Name	Contact Phone
Account Name Test Premier Customer	Contact Email
Type	Case Origin Web
Case Reason	
Time Spent	

- **Support User:**

- Login → Go to Cases → can **create/edit**.
- Opportunities → view-only (if configured).

Logged in as Agent Support (supportagent@yourcompany.com.dev) Log out as Agent Support

Search...

Sales app Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter Groups Cases More

Case

+ Follow Edit Delete Change Owner

Status New Customer Priority SLA Due Date

Feed Related

Post Poll

Share an update... Share

Most Recent Activity Search this feed...


All Updates Call Logs Text Posts Status Changes

Ramya Sree Pappireddy September 21, 2025 at 1:07 AM








Details

Case Owner Agent Support	Status New
Case Number 00001027	Priority High
Contact Name	Contact Phone
Account Name Test Premier Customer	Contact Email
Type	Case Origin Web
Case Reason	
Time Spent	

Logged in as Agent Support (supportagent@yourcompany.com.dev)Log out as Agent Support



Search...



Sales app

Home

Opportunities

Leads

Tasks

Files

Accounts

Contacts

Campaigns

Dashboards

Reports

Chatter

Groups

Calendar

More

Opportunity

Acme - Q1 Deal

+ Follow

Submit for Approval

Sharing

Prospecting

Qualification

Needs Analysis

Value Proposition

Id. Decision Make...

Perception Analysis

Proposal/Price Q...

Negotiation/Revi...

Closed

Mark Stage as Complete

Activity

Details

Chatter

New Task

Log a Call

New Event

Email

Filters: All time • All activities • All types

Refresh • Expand All • View All

Upcoming & Overdue

No activities to show.
Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

Related

Products (0)

Notes & Attachments (0)

Upload Files

Or drop files

Contact Roles (0)

To Do List