

RenewSure – Smart Contract Renewal & Expiry Management System.

Phase 3: Data Modeling & Relationships

Completion Status: Completed

Overview

In this phase, we created the data model for the RenewSure Contract Management System. This included creating the Contract object, custom fields, relationships with Account & Contact, and child objects (Renewals, FollowUps). Page layouts and related lists were configured for usability.

Step 3.1 – Create Custom Object: Contract

Status: Completed

- Object Label: Contract
- Plural: Contracts
- API Name: Contract_c_c
- Record Name: Contract Number (Auto Number) → Format: CON-{0000}
- Enabled Options: Allow Reports, Allow Activities, Track Field History
- Deployment Status: Deployed

The screenshot shows the Salesforce Setup interface for the Object Manager. The top navigation bar has 'SETUP > OBJECT MANAGER' and the object name 'Contract'. On the left, there's a sidebar with links like 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, and Restriction Rules. The main content area is titled 'Details' and contains two columns. The left column has a 'Description' section stating 'Stores business contracts with start date, end date, value, and renewal info.' and a 'Fields & Relationships' section listing the options mentioned in the text above. The right column has sections for 'Enable Reports' (checked), 'Track Activities' (checked), 'Track Field History' (checked), 'Deployment Status' (set to 'Deployed'), and 'Help Settings' (link to 'Standard salesforce.com Help Window'). At the bottom right of the main area are 'Edit' and 'Delete' buttons.

Step 3.2 – Add Contract Fields

Status: Completed

Created fields:

- Contract Name (Text)
- Start Date (Date)
- End Date (Date)
- Renewal Reminder Date (Date)
- Status (Picklist: Active, Expiring, Expired, Renewed)
- Renewal Type (Picklist: Annual, Quarterly, Monthly, One-time)
- Contract Value (Currency)
- Account (Lookup → Account)
- Related Contact (Lookup → Contact)
- Notes/Terms (Long Text Area)

The screenshot shows the Salesforce Object Manager interface for the 'Contract' object. The left sidebar lists various configuration tabs: Details, Fields & Relationships (selected), 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, and Scoping Rules. The main content area is titled 'Fields & Relationships' and displays a table of 15 items, sorted by Field Label. The table columns are: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The indexed column contains checkmarks for most fields.

Fields & Relationships				
15 Items, Sorted by Field Label				
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Account	Account_c__c	Lookup(Account)		✓
Contract Name	Contract_Name_c__c	Text(80)		▼
Contract Name	Name	Auto Number		✓
Contract Number	Contract_Number_c__c	Auto Number		▼
Contract Value	Contract_Value_c__c	Currency(16, 2)		▼
Created By	CreatedById	Lookup(User)		▼
End Date	End_Date_c__c	Date		▼
Last Modified By	LastModifiedById	Lookup(User)		▼
Notes	Notes_c	Long Text Area(32000)		▼
Owner	OwnerId	Lookup(User/Group)		✓

Step 3.3 – Page Layout Configuration

Status: Completed

Fields arranged into logical sections:

- Highlights: Contract Number, Contract Name, Status
- Contract Details: Account, Related Contact
- Dates & Renewal: Start Date, End Date, Renewal Reminder Date, Renewal Type
- Financials: Contract Value
- Administration: Owner, Created Date, Last Modified
- Notes/Terms

The screenshot shows the Salesforce Object Manager with the 'Contract' object selected. The left sidebar has a 'Page Layouts' section highlighted. The main area displays the page layout configuration with various sections like 'Information', 'Contract Details', 'Date & Renewal', and 'Financials'. Fields like Contract Name, Start Date, and Contract Value are listed with their respective field types and values.

Step 3.4 – Create Child Objects

Status: Completed

Created related child objects:

- Renewal_c (fields: Renewal Date, Status, Value, Owner)
- FollowUp_c (fields: FollowUp Date, Type, Status, Assigned To, Notes)

The screenshot shows the Salesforce Object Manager with a new object named 'Renewal' being created. The left sidebar lists various object settings like 'Details', 'Fields & Relationships', and 'Page Layouts'. The main area shows the 'Details' tab with fields for 'Description', 'API Name' (Renewal_c_c), and other configuration options like 'Enable Reports' and 'Deployment Status' (Deployed).

SETUP > OBJECT MANAGER
FollowUp

Details

Description

API Name
FollowUp_c__c

Custom ✓

Singular Label
FollowUp

Plural Label
FollowUps

Enable Reports ✓

Track Activities ✓

Track Field History ✓

Deployment Status Deployed

Help Settings Standard salesforce.com Help Window

Step 3.5 – Add Related Lists

✓ Status: Completed

Added related lists to Contract layout:

- Renewals
- FollowUps
- Files
- Notes
- Tasks (if Activities enabled)

SETUP > OBJECT MANAGER
Contract

Page Layouts

Related Lists

Renewals	New Change Owner				
Renewal Number Sample Text	Renewal Date 9/20/2025	Renewal Status Sample Text	Renewal Value €123.45	Renewal Owner Sarah Sample	Last Modified Date 9/20/2025, 9:42 AM

Open Activities	New Task New Event					
Subject Sample Text	Name Sample Text	Task ✓	Due Date 9/20/2025, 9:42 AM	Status Sample Text	Priority Sample Text	Assigned To Sarah Sample

Activity History	Log a Call Mail Merge Send an Email View All				
Subject Sample Text	Name Sample Text	Task ✓	Due Date 9/20/2025, 9:42 AM	Assigned To Sarah Sample	Last Modified Date/Time 9/20/2025, 9:42 AM

FollowUps	New Change Owner				
FollowUp Name Sample Text	FollowUp Date 9/20/2025, 9:42 AM	Type Sample Text	Status Sample Text	Assigned To Sarah Sample	Last Modified Date 9/20/2025, 9:42 AM

Files

Step 3.6 – Testing

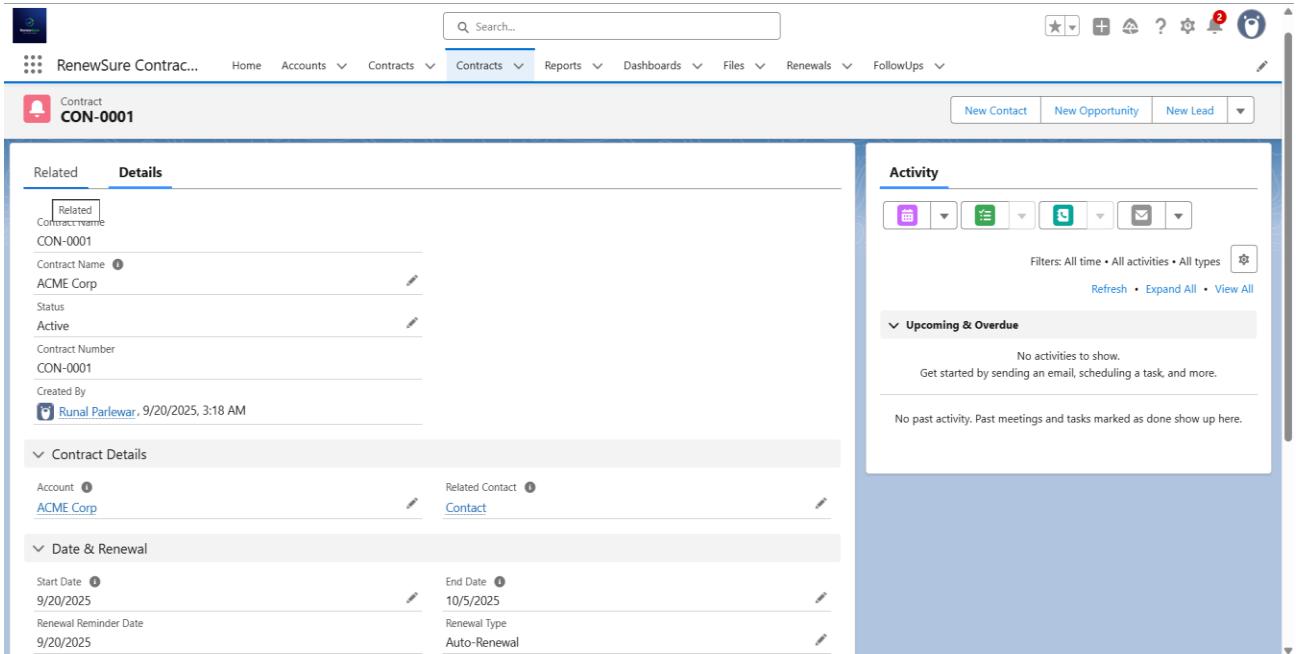
 Status: Completed

Created sample Contract record (Test Contract – ACME Corp).

Created a Renewal from related list.

Created a FollowUp from related list.

Verified that related records appear in Contract details.



The screenshot shows the RenewSure Contracts application interface. At the top, there is a navigation bar with links for Home, Accounts, Contracts, Reports, Dashboards, Files, Renewals, and FollowUps. Below the navigation bar, the main content area displays a Contract record for "CON-0001". The record includes fields for Contract Name (ACME Corp), Status (Active), Contract Number (CON-0001), and Created By (Runal Parlewar). There are sections for Contract Details (Account: ACME Corp) and Date & Renewal (Start Date: 9/20/2025, End Date: 10/5/2025, Renewal Type: Auto-Renewal). To the right of the contract details, there is an "Activity" sidebar with buttons for creating new contacts, opportunities, and leads. It also shows a message indicating "No activities to show." and "Get started by sending an email, scheduling a task, and more."