

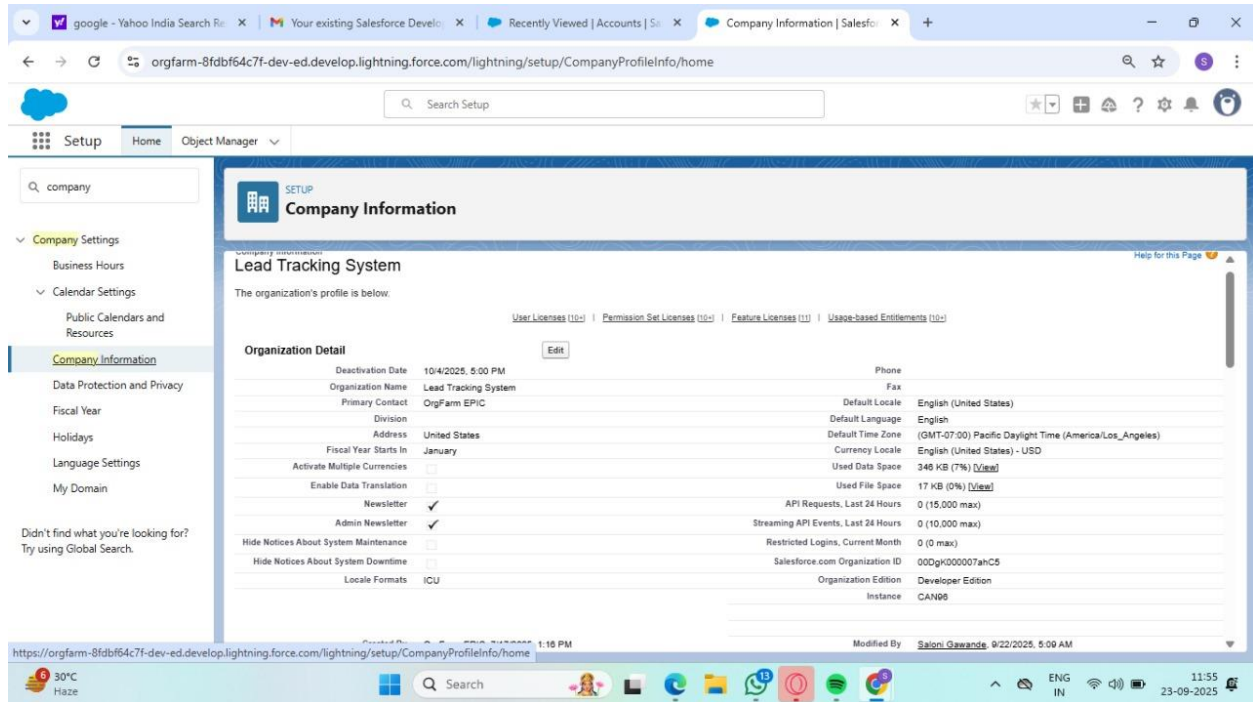
LEAD TRACKING SYSTEM

Phase 2: System Design & Architecture

Step 1: Define Org Structure

Go to Setup (gear icon → Setup).

Under Company Settings → Company Information, review org limits (users, storage).

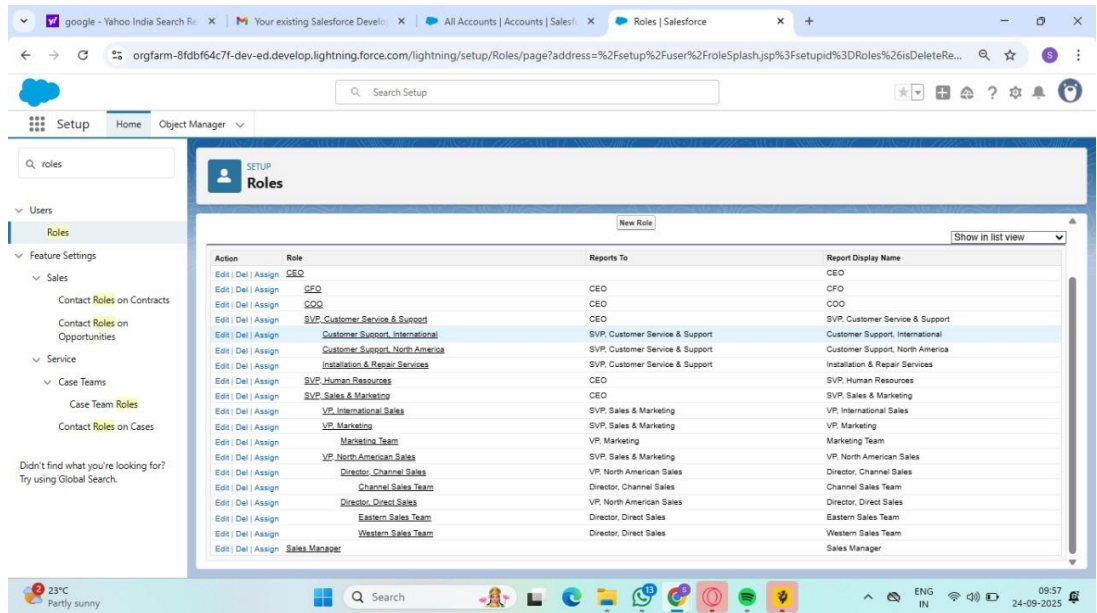


The screenshot shows the Salesforce Setup interface for a company named "Lead Tracking System". The left sidebar lists various setup areas, with "Company Information" selected. The main content area displays the organization's profile, including details like Organization Name, Primary Contact, Address, and various system settings. The page is titled "Company Information" and includes a search bar at the top. The organization's profile is divided into sections: "Organization Detail" and "Limits". The "Organization Detail" section includes fields for Deactivation Date, Organization Name, Primary Contact, Division, Address, Fiscal Year Starts In, Activate Multiple Currencies, Enable Data Translation, Newsletter, Admin Newsletter, Hide Notices About System Maintenance, Hide Notices About System Downtime, and Locale Formats. The "Limits" section includes fields for Phone, Fax, Default Locale, Default Language, Default Time Zone, Currency Locale, Used Data Space, Used File Space, API Requests, Last 24 Hours, Streaming API Events, Last 24 Hours, Restricted Logins, Current Month, Salesforce.com Organization ID, Organization Edition, and Instance. The page is modified by "Saloni Gaurande" on 9/22/2025, 5:00 AM.

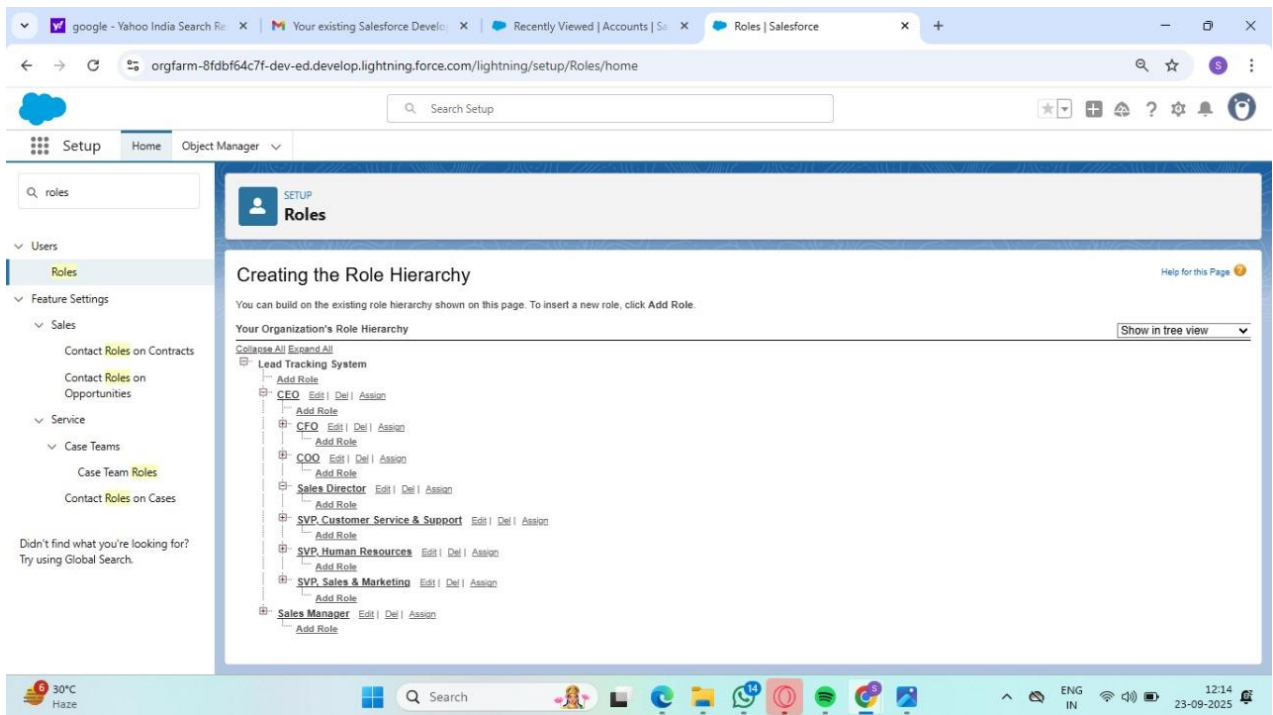
Organization Detail	
Deactivation Date	10/4/2025, 5:00 PM
Organization Name	Lead Tracking System
Primary Contact	OrgFarm EPIC
Division	
Address	United States
Fiscal Year Starts In	January
Activate Multiple Currencies	<input type="checkbox"/>
Enable Data Translation	<input type="checkbox"/>
Newsletter	<input checked="" type="checkbox"/>
Admin Newsletter	<input checked="" type="checkbox"/>
Hide Notices About System Maintenance	<input type="checkbox"/>
Hide Notices About System Downtime	<input type="checkbox"/>
Locale Formats	ICU

Limits	
Phone	
Fax	
Default Locale	English (United States)
Default Language	English
Default Time Zone	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)
Currency Locale	English (United States) - USD
Used Data Space	345 KB (7%) View
Used File Space	17 KB (0%) View
API Requests, Last 24 Hours	0 (15,000 max)
Streaming API Events, Last 24 Hours	0 (10,000 max)
Restricted Logins, Current Month	0 (0 max)
Salesforce.com Organization ID	00DgK000007ahC5
Organization Edition	Developer Edition
Instance	CAN06

Under Users → Roles, define roles: Sales Manager



Set hierarchy → Sales Manager (top)



Step 2: Design Data Model (Objects & Fields)

From Setup, search Object Manager.

Click Create → Custom Object.

Name: Lead

Add fields:

SETUP > OBJECT MANAGER					
Lead Tracking System					
Details	Fields & Relationships <input type="text" value="Quick Find"/> New				
Fields & Relationships	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Page Layouts	Created By	CreatedById	Lookup(User)		
Lightning Record Pages	Lead Name	Lead_Name__c	Text(100)		
Buttons, Links, and Actions	Email	Email__c	Email		
Compact Layouts	Phone Number	Phone__c	Phone		
Field Sets	Lead ID	LeadID__c	Auto Number		✓
Object Limits	Company Name	Company__c	Text(150)		
Record Types	Lead Source	LeadSource__c	Web, Event, Referral, Partner, Other		
Related Lookup Filters	Lead Status	LeadStatus__c	New, Working, Qualified, Converted, Disqu...		✓
Restriction Rules	Assigned To	OwnerId	Lookup(User/Queue)		
Scoping Rules	Created Date	CreatedDate	Date/Time		
Object Access	Last Modified By	LastModifiedById	Lookup(User)		
	Last Modified Da	LastModifiedDate	Date/Time		

Step 3: Establish Relationships

Validate relationships in Schema Builder:

Setup → Schema Builder → drag objects and check connections.

The screenshot displays the Salesforce Schema Builder interface. The top navigation bar shows 'Setup' and 'Object Manager' tabs. The main area is titled 'Schema Builder' and contains a complex relationship diagram. The diagram shows various objects (Lead, Contact, Account, Cart, etc.) and their fields connected by lines, representing the relationships between them. The left sidebar lists objects and fields, and the right sidebar shows a legend for the relationship types. The bottom of the screen shows the Windows taskbar with the date and time.

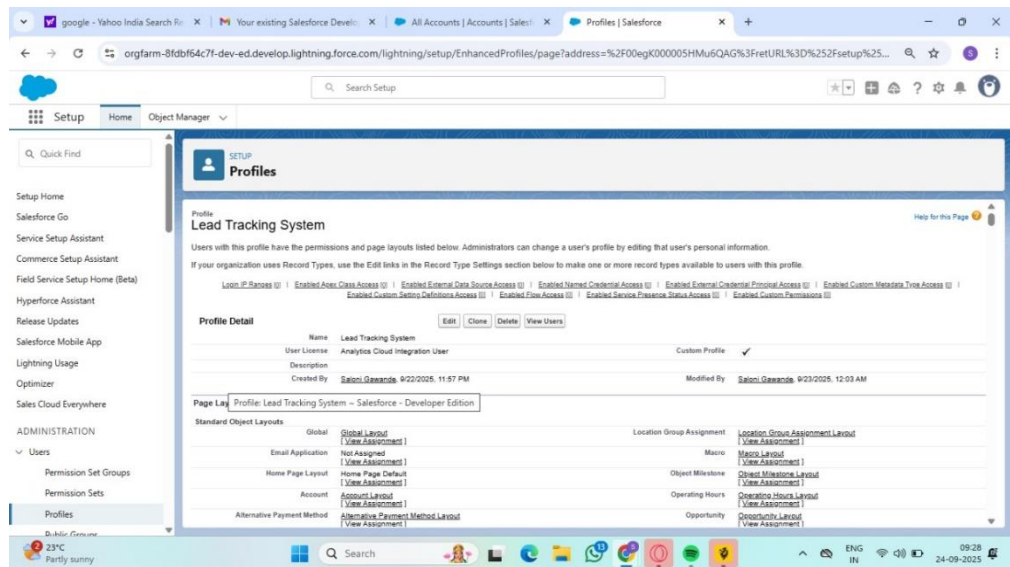
Step 4: Define Page Layouts & Record Types

Go to Object Manager → Lead Profile → Page Layouts.

Step 5: Role-Based Access & Profiles

Go to Setup → Profiles.

HR Manager → Full access to all objects.



The screenshot shows the Salesforce Setup interface for the 'Lead Tracking System' profile. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area displays the profile details and page layouts.

Profile Detail

Name	Lead Tracking System
User License	Analytics Cloud Integration User
Description	
Created By	Sajoni Ganesan
Created On	9/23/2025, 11:57 PM
Modified By	Sajoni Ganesan
Modified On	9/23/2025, 12:03 AM

Page Layouts

Standard Object Layouts	Location Group Assignment
Global: Global Layout (View Assignment)	Location Group Assignment Layout (View Assignment)
Email Application: Not Assigned (View Assignment)	Macro: Macro Layout (View Assignment)
Home Page Layout: Home Page Default (View Assignment)	Object Milestone: Object Milestone Layout (View Assignment)
Account: Account Layout (View Assignment)	Operating Hours: Operating Hours Layout (View Assignment)
Alternative Payment Method: Alternative Payment Method Layout (View Assignment)	Opportunity: Opportunity Layout (View Assignment)

Employee Onboarding Application | Asha Kumar | Employee Profile | Profiles | Salesforce | Recently Viewed | Employees P |

orgfarm-559f6368d3-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00egK000005HOMP

Setup Home Object Manager

profiles

Users

Profiles

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

SETUP Profiles

Custom Object Permissions

	Basic Access				Data Administration				Basic Access				Data Administration		
	Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields		Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields
Assets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Onboarding Tasks	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Document Checklists	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Students	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Employees Profiles	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Training Modules	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Mentors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>								

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login

Password Policies

User passwords expire in: 90 days

Enforce password history: 3 passwords remembered

Minimum password length: 8

Password complexity requirement: Must include alpha and numeric characters

Password question requirement: Cannot contain password

Maximum invalid login attempts: 10

Lockout effective period: 15 minutes

Obscure secret answer for password resets: ☐

Require a minimum 1 day password lifetime: ☐

Don't immediately expire links in forgot password emails: ☐

Edit Clone Delete View Users

https://orgfarm-559f6368d3-dev-ed.develop.my.salesforce.com/one/app#/alohaRedirect/00egK000005HOMP?isdt=p1

Type here to search

1 cm of rain Fri 9/23/2025 12:07 PM

Team Lead :

Employee Onboarding Application | Asha Kumar | Employee Profile | Profiles | Salesforce | Recently Viewed | Employees P |

orgfarm-559f6368d3-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00egK000005HOPd

Setup Home Object Manager

profiles

Users

Profiles

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

SETUP Profiles

Data Share Targets

Data Share Target Connection

Work Types

Work Type Groups

Custom Object Permissions

	Basic Access				Data Administration				Basic Access				Data Administration		
	Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields		Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields
Assets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Onboarding Tasks	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Document Checklists	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Students	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Employees Profiles	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Training Modules	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mentors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>								

Session Settings

Session Times Out After: 2 hours of inactivity

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Require a minimum 1 day password lifetime: ☐

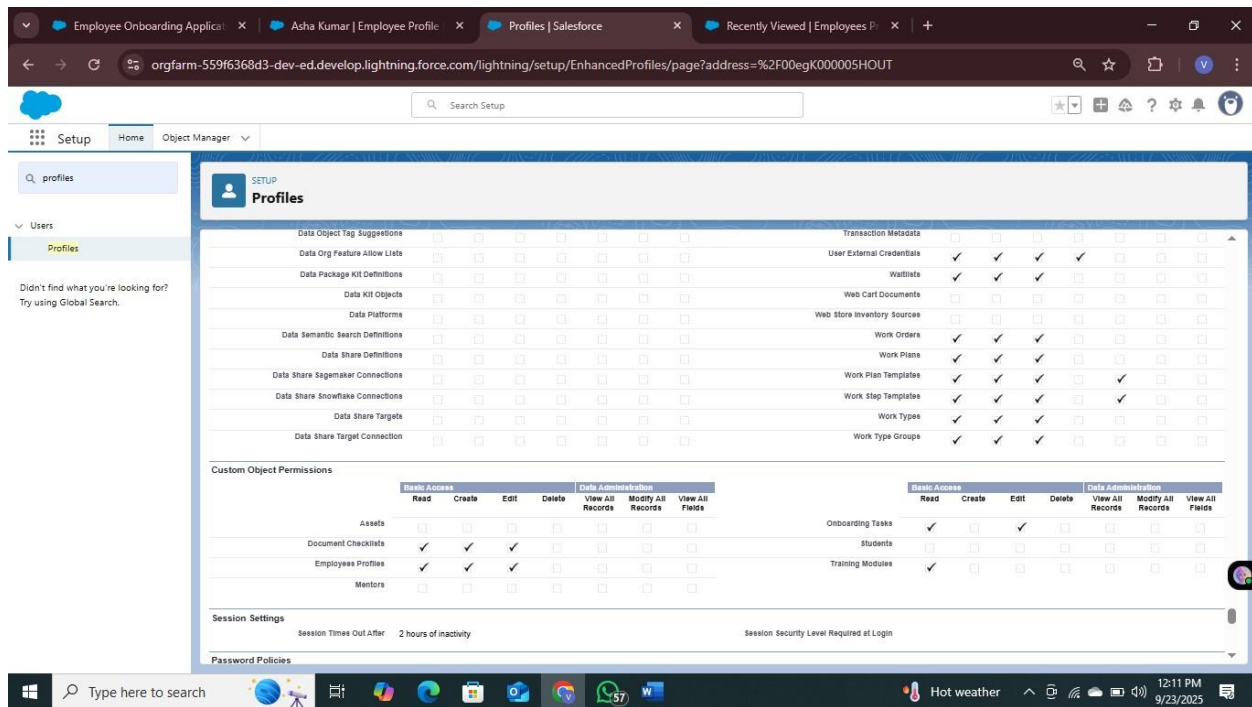
Don't immediately expire links in forgot password emails: ☐

https://orgfarm-559f6368d3-dev-ed.develop.my.salesforce.com/one/app#/alohaRedirect/00egK000005HOPd?isdt=p1

Type here to search

NIFTY -0.38% 12:09 PM 9/23/2025

Employee → Read/Edit their own profile.

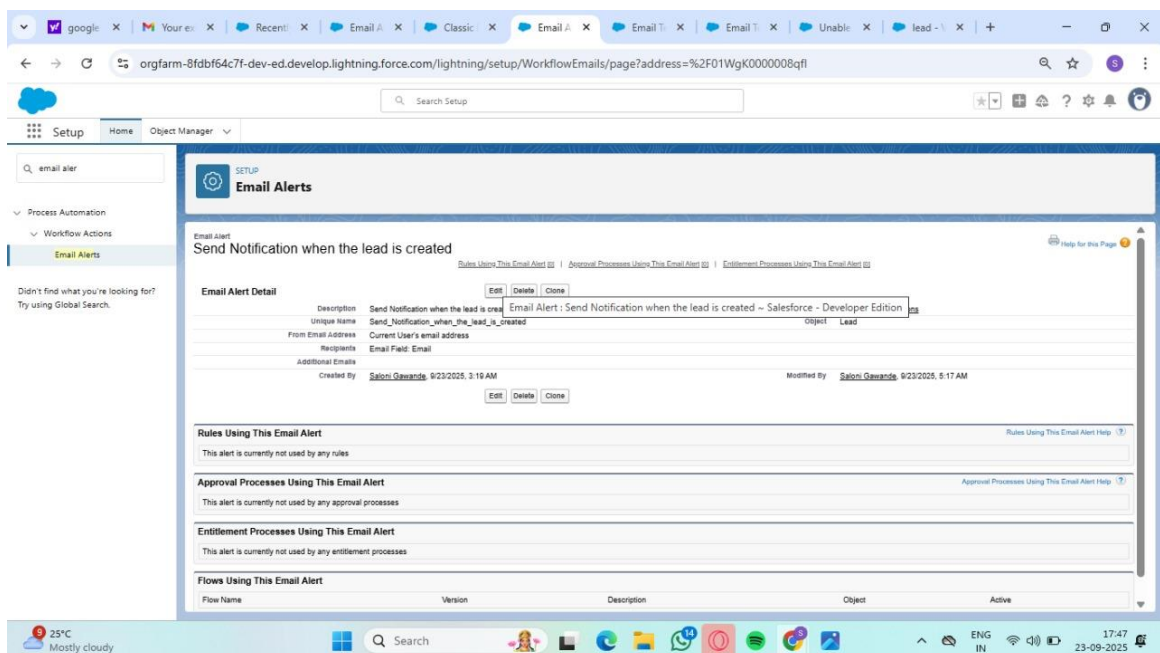


The screenshot shows the Salesforce Setup interface for the 'Profiles' page. The left sidebar contains a search bar with 'profiles' entered and a navigation menu with 'Users' and 'Profiles' (selected). The main content area is titled 'SETUP Profiles' and displays a table of permissions for various objects. The table is organized into two columns of checkboxes for 'Basic Access' (Read, Create, Edit, Delete) and 'Data Administration' (View All Records, Modify All Records, View All Fields). The objects listed include Data Object Tag Suggestions, Data Org Feature Allow Lists, Data Package Kit Definitions, Data Kit Objects, Data Platforms, Data Semantic Search Definitions, Data Share Definitions, Data Share Sagemaker Connections, Data Share Snowflake Connections, Data Share Targets, Data Share Target Connection, Transaction Metadata, User External Credentials, Waitlists, Web Cart Documents, Web Store Inventory Sources, Work Orders, Work Plans, Work Plan Templates, Work Step Templates, Work Types, and Work Type Groups. Below the table, there are sections for 'Custom Object Permissions' (Assets, Document Checklists, Employees Profiles, Mentors), 'Session Settings' (Session Times Out After: 2 hours of inactivity), and 'Password Policies'. The bottom of the screen shows a Windows taskbar with various application icons and a system clock indicating 12:11 PM on 9/23/2025.

Step 6: Plan Automation Architecture

Go to Setup → Flows.

Plan email notifications via Email Alerts + Flows.



The screenshot shows the Salesforce Setup interface for the 'Email Alerts' page. The left sidebar contains a search bar with 'email alert' entered and a navigation menu with 'Process Automation' and 'Workflow Actions' (selected). The main content area is titled 'SETUP Email Alerts' and displays a form for creating a new email alert. The form includes fields for 'Email Alert Detail', 'Description', 'Unique Name', 'From Email Address', 'Recipients', 'Additional Emails', 'Created By', 'Modified By', 'Object', and 'Active'. The 'Description' field contains the text 'Send Notification when the lead is created'. The 'Unique Name' field contains 'Send_Notification_when_the_lead_is_created'. The 'From Email Address' field contains 'Current User's email address'. The 'Recipients' field contains 'Email Field: Email'. The 'Additional Emails' field is empty. The 'Created By' field contains 'Saloni Gauravde' and the 'Modified By' field contains 'Saloni Gauravde'. The 'Object' field contains 'Lead'. The 'Active' field is checked. Below the form, there are sections for 'Rules Using This Email Alert', 'Approval Processes Using This Email Alert', 'Entitlement Processes Using This Email Alert', and 'Flows Using This Email Alert'. The bottom of the screen shows a Windows taskbar with various application icons and a system clock indicating 17:47 on 23-09-2025.

Create a Flow (Record-Triggered): When Employee Profile is created → Auto-generate onboarding tasks .

The screenshot displays the Salesforce Flow Builder interface for a flow named "Lead Tracking System Automation : V1". The flow is a Record-Triggered Flow that starts with a "Record Triggered Flow Start" event, followed by a "Run Immediately" decision. The flow then proceeds through three steps: "Create Task" (Create Records), "Send Email" (Email Alert), and "End".

The right sidebar shows the "Debug Details" panel, which includes a search bar and a list of debug details. The details are organized into sections:

- Create Records: Create Task**
 - One or more Lead Task , records were tuto be created.
 - > Details
- Lead**
 - Lead send Email
 - > Details
- Rollback**
 - > Details
- How the Interview Finished**
 - > Details
 - The few. interview ran for, 1,27 seconds and mached on September 25 2026

The bottom of the screen shows the Windows taskbar with the search bar, task icons, and system tray information (83°C, Mostly cloudy, 2:35 PM).

Lead Tracking System

Home

Contacts

Cases

Tasks

Files

Reports

Approval Requests

Dashboards ▾

More ▾

Recently Viewed

1 item · Updated 7 minutes ago

NewImportChange Owner🔗

+ ▾⌂🔗 ▾

- ☐ Lead Name
- ☐ Amit Sharma ▾