Phase 3 — Data Modeling & Relationships

Objective

To design the data structure of Lead Tracking System by creating custom objects, fields, and relationships that capture the system's core processes: Leads, Opportunities, Contacts, Accounts, and Activities.

Step 1: Create the Lead Object

1. Go to Setup → Object Manager → Create → Custom Object.
2. Enter details:
3. - Label: Lead
   - Plural Label: Leads
   - Record Name: Lead Name
   - Check Allow Reports and Allow Activities.
4. Save.

Add fields:

1. First Name → Text(40), Required
2. Last Name → Text(80), Required
3. Email → Email
4. Phone → Phone
5. Lead Source → Picklist (Website, Referral, Social, Campaign, Walk-in)
6. Status → Picklist (New, Working, Qualified, Unqualified)
7. Company → Text(100)
8. Address → Long Text Area(255)

Step 2: Create the Opportunity Object

1. Setup → Object Manager → Create → Custom Object.
2. Enter details:
3. - Label: Opportunity
   - Plural: Opportunities
   - Record Name: Opportunity Name (Text).
4. Save.

Add fields:

1. Lead → Lookup(Lead)
2. Close Date → Date
3. Stage → Picklist (Prospecting, Qualification, Negotiation, Closed Won, Closed Lost)
4. Amount → Currency(16,2)
5. Probability → Percent(3,0)

Step 3: Create the Contact Object

1. Create object:
2. - Label: Contact
   - Plural: Contacts
   - Record Name: Contact Name (Text).

Add fields:

1. Lead → Lookup(Lead)
2. Email → Email
3. Phone → Phone
4. Role → Picklist (Decision Maker, Influencer, End User)

Step 4: Create the Account Object

1. Create object:
2. - Label: Account
   - Plural: Accounts
   - Record Name: Account Name (Text).

Add fields:

1. Industry → Picklist (IT, Finance, Healthcare, Education, Others)
2. Revenue → Currency(16,2)
3. Number of Employees → Number(6,0)
4. Website → URL
5. Address → Text(255)

Step 5: Create the Activity Object

1. Create object:
2. - Label: Activity
   - Plural: Activities
   - Record Name: Activity Name (Text).

Add fields:

1. Related Lead → Lookup(Lead)
2. Related Opportunity → Lookup(Opportunity)
3. Activity Date → Date
4. Activity Type → Picklist (Call, Meeting, Email, Task)
5. Notes → Long Text Area(32768)

Step 6: Define Relationships

1. Lead → Opportunity: One-to-Many (a single lead can generate multiple opportunities).
2. Lead → Contact: One-to-Many (a single lead can be linked with many contacts).
3. Account → Contact: One-to-Many (an account can have multiple contacts).
4. Opportunity → Activity: One-to-Many (each opportunity can have many activities).
5. Lead → Activity: Lookup to connect activities with leads.

Step 7: Verify with Schema Builder

1. Go to Setup → Schema Builder.
2. Drag all created objects (Lead, Opportunity, Contact, Account, Activity).
3. Visually confirm the relationships:
4. - Lead → Opportunity (Lookup).
   - Lead → Contact (Lookup).
   - Account → Contact (Lookup).
   - Opportunity → Activity (Lookup).
5. Save schema diagram.

Outcome of Phase 3:

The data model of Lead Tracking System is successfully created with properly linked objects, fields, and relationships to manage leads, opportunities, contacts, accounts, and activities.