

Phase 3: Data Modeling & Relationships

In this phase, I completed the following tasks:

Overview:

We need 3 custom objects:

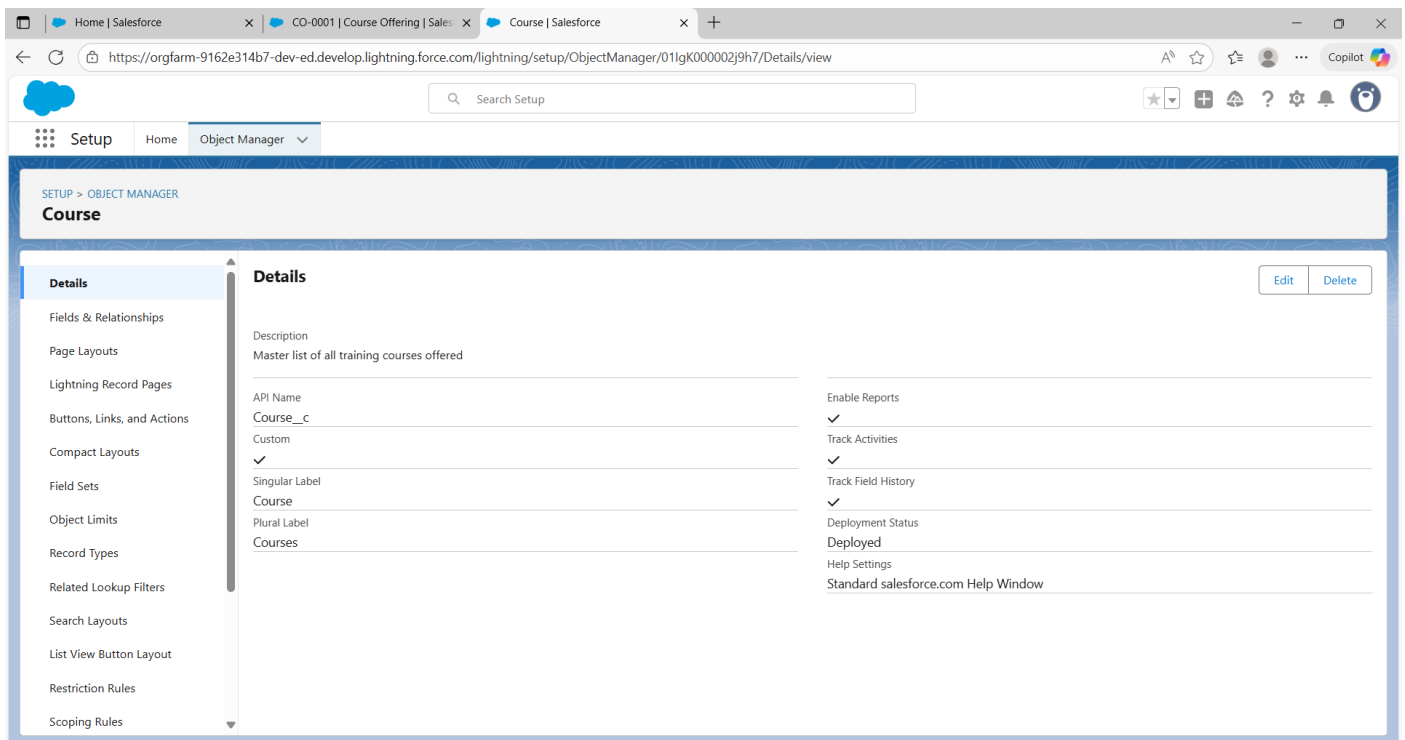
1. **Course** - Master list of all training courses
2. **Course Offering** - Specific scheduled instances of courses
3. **Enrollment** - Records of participant registrations

Relationships:

- Course → Course Offering (One-to-Many)
- Course Offering → Enrollment (One-to-Many)
- Contact (Participant) → Enrollment (One-to-Many)

Section 1: Create Course Object

1. Created **Course** object with fields: Course Name, Description, Category, Duration, Prerequisites, Skills Gained.



Home | Salesforce

Course | Salesforce

https://orgfarm-9162e314b7-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000002j9h7/FieldsAndRelationships/view

Search Setup

Setup

Home

Object Manager

SETUP > OBJECT MANAGER

Course

Details

Fields & Relationships

9 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Category	Category__c	Picklist		
Course Name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Description	Description__c	Long Text Area(32768)		
Duration (Hours)	Duration_Hours__c	Number(3, 1)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Prerequisites	Prerequisites__c	Long Text Area(5000)		
Skills Gained	Skills_Gained__c	Long Text Area(5000)		

Section 2: Create Course Offering Object

Created **Course Offering** object with fields: Course (lookup), Start/End Date, Location, Instructor, Capacity, Enrolled Count, Available Seats, Status.

Home | Salesforce

Course Offering | Salesforce

https://orgfarm-9162e314b7-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000002j8h/Details/view

Search Setup

Setup

Home

Object Manager

SETUP > OBJECT MANAGER

Course Offering

Details

Details

Edit

Delete

Description

Scheduled instances of courses with specific dates and instructors

API Name

Course_Offering__c

Custom

✓

Singular Label

Course Offering

Plural Label

Course Offerings

Enable Reports

✓

Track Activities

✓

Track Field History

✓

Deployment Status

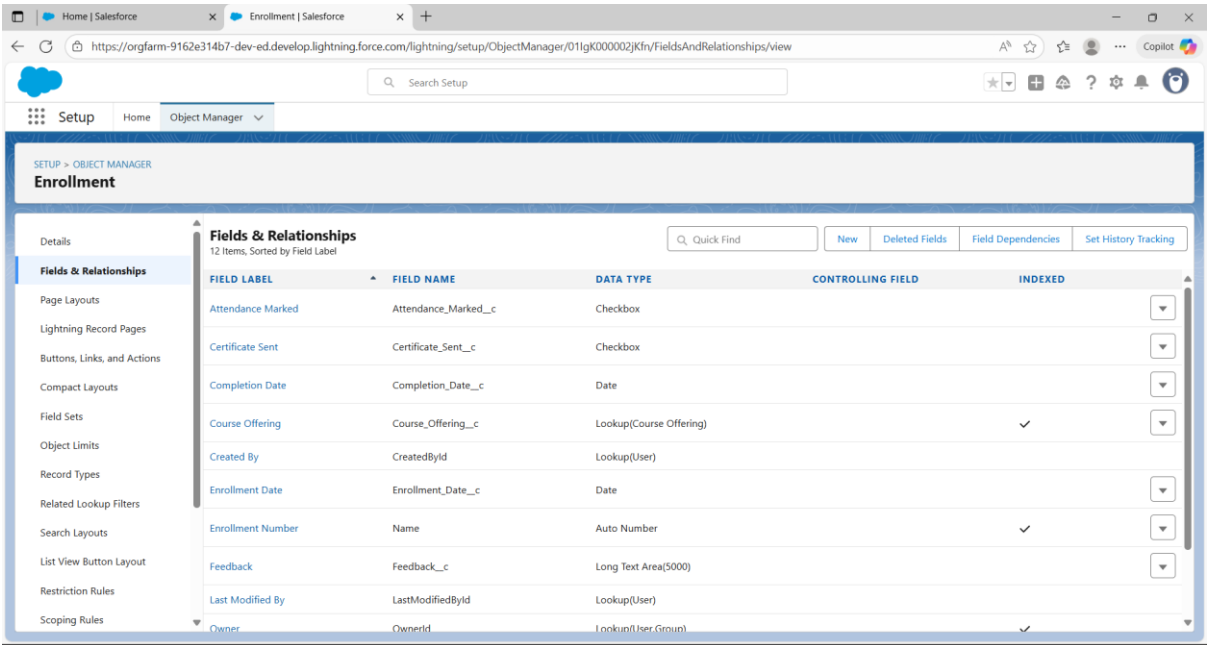
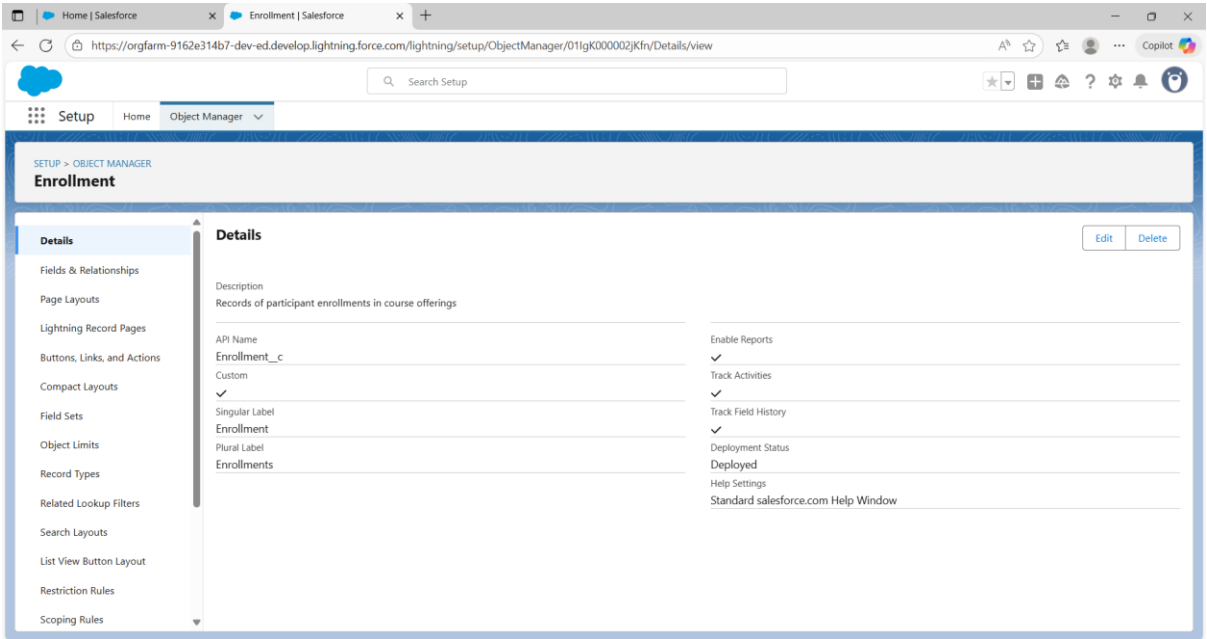
Deployed

Help Settings

Standard salesforce.com Help Window

Section 3: Create Enrollment Object

Created **Enrollment** object with fields: Participant (lookup), Course Offering (lookup), Enrollment Date, Status, Attendance, Completion Date, Certificate Sent, Feedback.



Home | Salesforce x Enrollment | Salesforce x +

https://orgfarm-9162e314b7-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000002JKfn/FieldsAndRelationships/view

Setup Home Object Manager

Enrollment

Details

Fields & Relationships

12 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

Completion Date	Completion_Date__c	Date	
Course Offering	Course_Offering__c	Lookup(Course Offering)	✓
Created By	CreatedById	Lookup(User)	
Enrollment Date	Enrollment_Date__c	Date	
Enrollment Number	Name	Auto Number	✓
Feedback	Feedback__c	Long Text Area(5000)	
Last Modified By	LastModifiedById	Lookup(User)	
Owner	OwnerId	Lookup(User/Group)	✓
Participant	Participant__c	Lookup(Contact)	✓
Status	Status__c	Picklist	

Section 4: Set Org-Wide Defaults (OWD)

Step 1: Access Sharing Settings

Home | Salesforce x Sharing Settings | Salesforce x +

https://orgfarm-9162e314b7-dev-ed.develop.lightning.force.com/lightning/setup/SecuritySharing/home

Setup Home Object Manager

sharing settings

Security

Sharing Settings

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

Sharing Settings

This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data. Go to [Background Jobs](#) to monitor the progress of a change to an organization-wide default or a parallel sharing recalculation.

Manage sharing settings for: All Objects

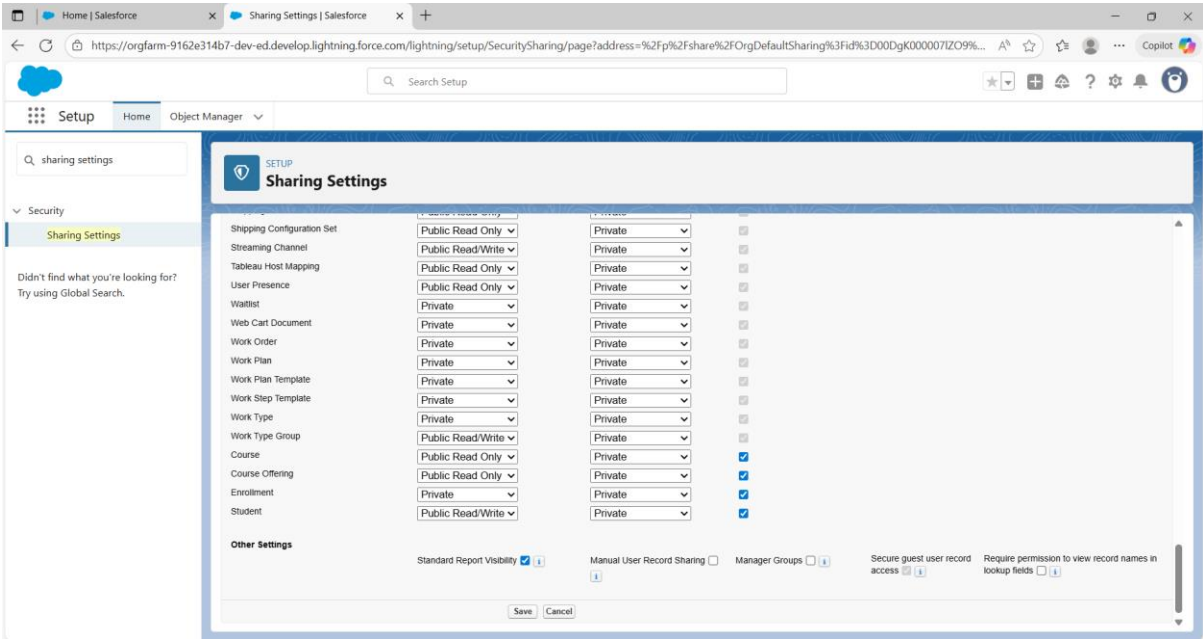
[Disable External Sharing Model](#)

Default Sharing Settings

Organization-Wide Defaults

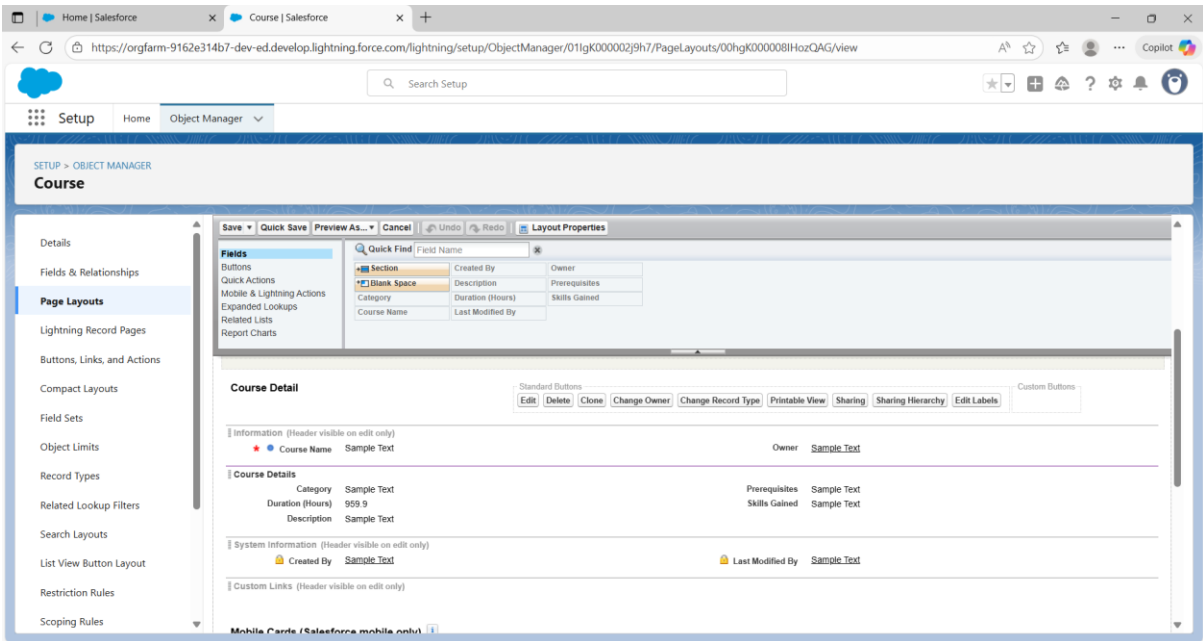
Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	✓
Account and Contract	Public Read/Write	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Order	Controlled by Parent	Controlled by Parent	✓
Asset	Controlled by Parent	Controlled by Parent	✓
Opportunity	Public Read/Write	Private	✓
Case	Public Read/Write/Transfer	Private	✓
Campaign	Public Full Access	Private	✓
Campaign Member	Controlled by Campaign	Controlled by Campaign	✓
User	Public Read Only	Private	✓
Activity	Private	Private	✓

Step 2: Edit OWD for Custom Objects



Section 5: Customize Page Layouts

Step 1: Customize Course Layout



Step 2: Customize Course Offering Layout

Home | Salesforce | Course Offering | Salesforce

https://orgfarm-9162e314b7-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000002JBh/PageLayouts/00hgK000008IMgbQAG/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Course Offering

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

Triggers

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Quick Find

Field Name

*

Section

Course

Enrolled Count

Offering Number

Status

Blank Space

Created By

Instructor

Owner

Available Seats

End Date

Last Modified By

Start Date

Capacity

End Time

Location

Start Time

Course Offering Detail

Standard Buttons

Edit Delete Close Change Owner Change Record Type Printable View Sharing Sharing Hierarchy Edit Labels

Custom Buttons

Course Information

Course

Instructor

Location

Sample Text

Sample Text

Sample Text

Schedule

Start Date

End Date

Start Time

End Time

10/3/2025

10/3/2025

Sample Text

Sample Text

Enrollment

Capacity

Enrolled Count

Available Seats

4,516

3,126

11,596

Status

Sample Text

Step 3: Customize Enrollment Layout

Home | Salesforce | Enrollment | Salesforce

https://orgfarm-9162e314b7-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000002JKfn/PageLayouts/00hgK000008ikYZQAD/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Enrollment

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

Restriction Rules

Scoping Rules

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Quick Find

Field Name

*

Section

Completion Date

Enrollment Number

Participant

Blank Space

Course Offering

Feedback

Status

Attendance Marked

Created By

Last Modified By

Owner

Certificate Sent

Enrollment Date

Owner

Enrollment Information

Participant

Enrollment Date

Course Offering

Status

Sample Text

10/3/2025

Sample Text

Sample Text

Progress & Feedback

Attendance Marked

Certificate Sent

✓

✓

Completion Date

Feedback

10/3/2025

Sample Text

Information (Header visible on edit only)

Enrollment Number

GEN-2004-001234

Owner

Sample Text

System Information (Header visible on edit only)

Created By

Sample Text

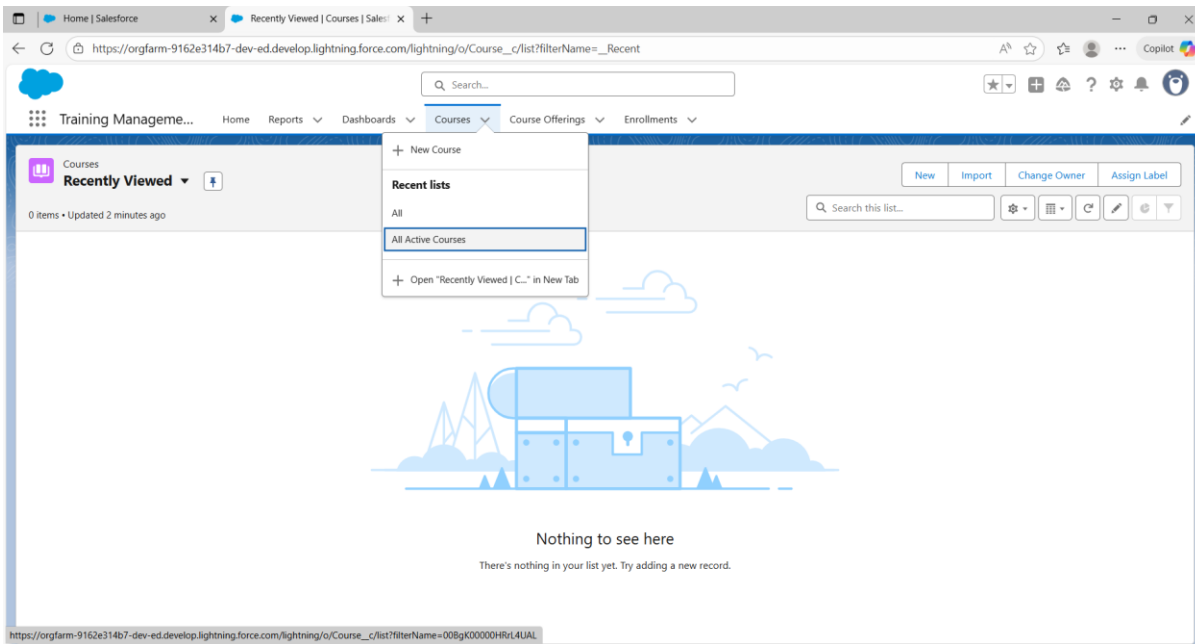
Last Modified By

Sample Text

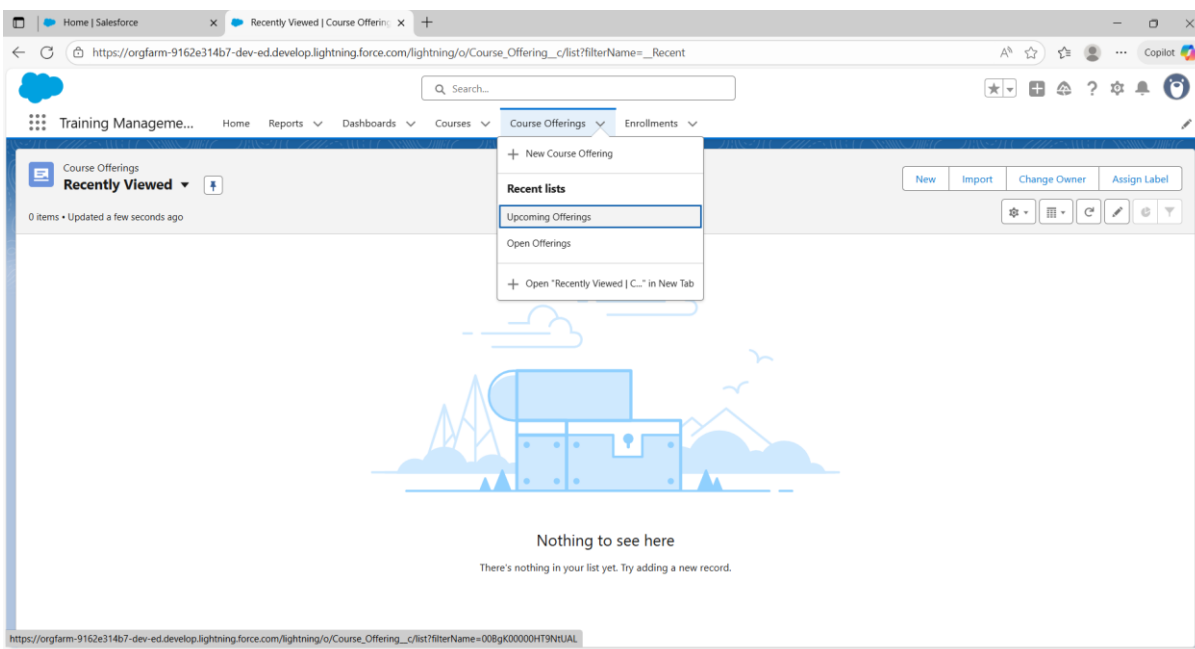
Custom Links (Header visible on edit only)

Section 6: Create List Views

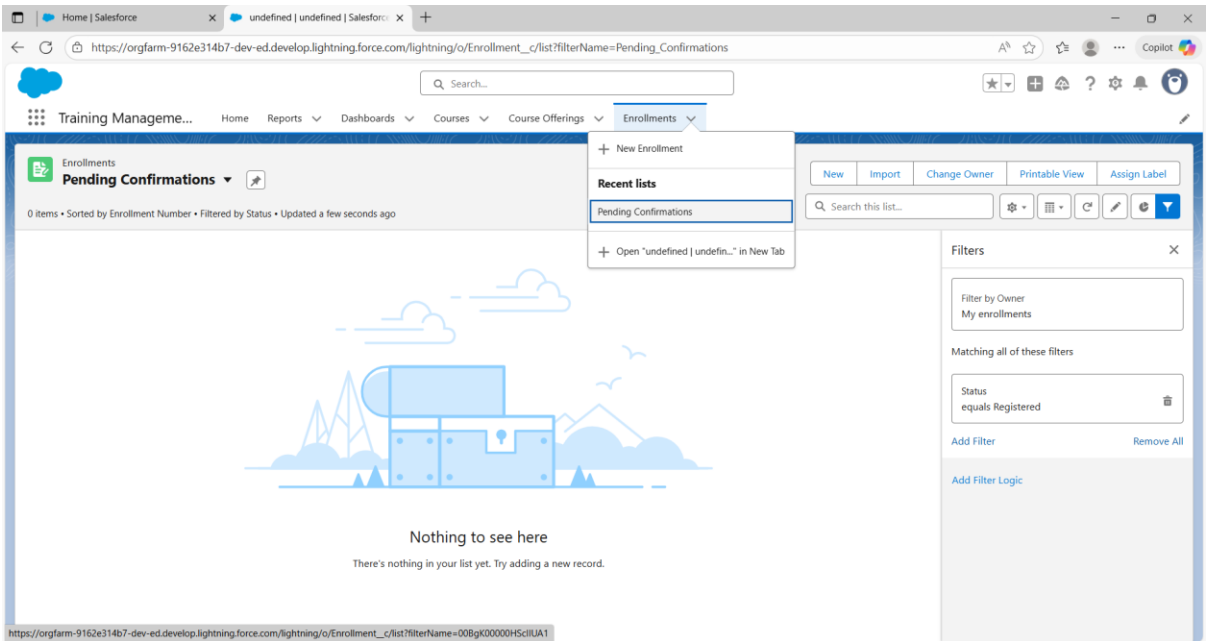
Step 1: Create Course List Views



Step 2: Create Course Offering Views

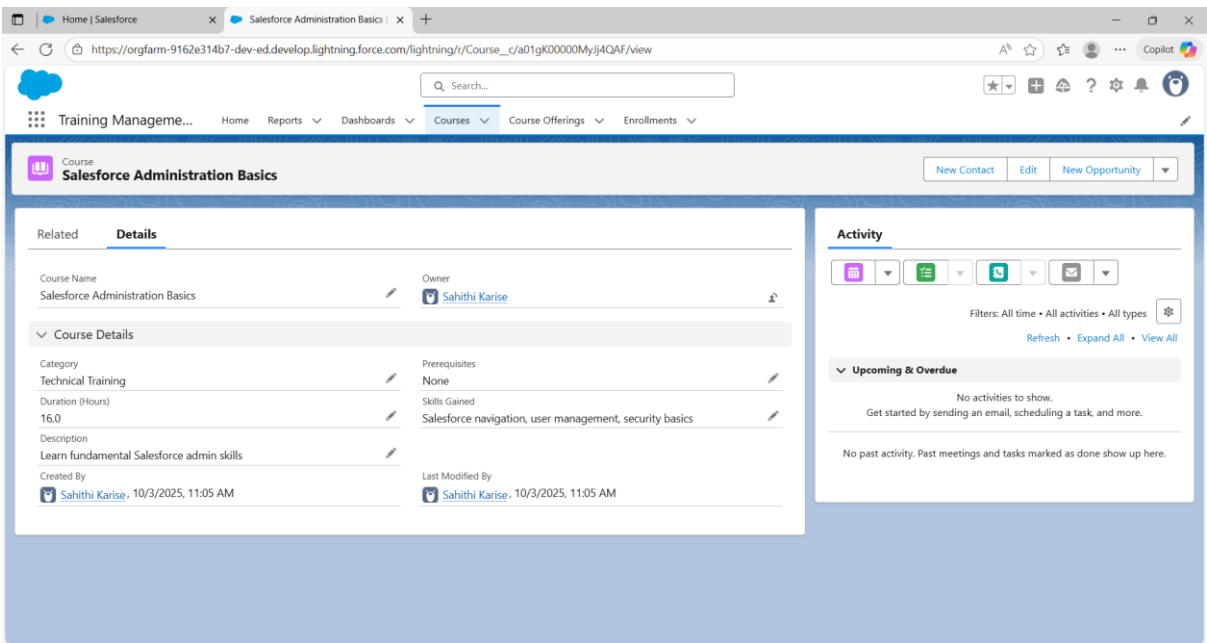


Step 3: Create Enrollment Views



Section 7: Test Data Creation

Step 1: Create Sample Course



Step 2: Create Sample Course Offering

The screenshot displays the Salesforce Training Management interface for a specific Course Offering (CO-0001). The interface is divided into two main sections: 'Details' and 'Activity'.

Details Section:

- Course Information:**
 - Course: [Salesforce Administration Basics](#)
 - Instructor: [Sahithi Karise](#)
 - Location: Conference Room A
- Schedule:**
 - Start Date: 10/10/2025
 - End Date: 10/12/2025
 - Start Time: 9:00:00 AM
 - End Time: 5:00:00 PM
- Enrollment:**

Activity Section:

- Filters: All time • All activities • All types
- Buttons: 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.

Step 3: Create Sample Contact (Participant)

The screenshot displays the Salesforce Training Management interface for the same Course Offering (CO-0001), focusing on the enrollment details. The interface is divided into two main sections: 'Details' and 'Enrollment'.

Details Section:

- Start Date:** 10/10/2025
- End Date:** 10/12/2025
- Start Time:** 9:00:00 AM
- End Time:** 5:00:00 PM

Enrollment Section:

- Capacity:** 25
- Enrolled Count:** 0
- Available Seats:** 25
- Status:** Open
- Offering Number:** CO-0001
- Created By:** [Sahithi Karise](#), 10/3/2025, 11:07 AM
- Owner:** [Sahithi Karise](#)
- Last Modified By:** [Sahithi Karise](#), 10/3/2025, 11:07 AM

Step 4: Create Sample Enrollment

Home | Salesforce

ENR-00001 | Enrollment | Salesforce

https://orgfarm-9162e314b7-dev-ed.develop.lightning.force.com/lightning/r/Enrollment__c/a03gK00000CrzfzQAB/view

Search...

Training Manageme... Home Reports Dashboards Courses Course Offerings Enrollments * Test Participant | Contact

Enrollment ENR-00001

Enrollment "ENR-00001" was created.

New Contact Edit New Opportunity

Related Details

Enrollment Information

Participant	Course Offering
Test Participant	CO-0001
Enrollment Date	Status
10/3/2025	Registered

Progress & Feedback

Attendance Marked	Completion Date
<input type="checkbox"/>	
Certificate Sent	Feedback
<input type="checkbox"/>	
Enrollment Number	Owner
ENR-00001	Sahithi Karise
Created By	Last Modified By
Sahithi Karise , 10/3/2025, 11:12 AM	Sahithi Karise , 10/3/2025, 11:12 AM

Activity

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.

Section 8: Verify Relationships

Step 1: Check Course → Course Offering

Home | Salesforce

Course Offerings | Salesforce

https://orgfarm-9162e314b7-dev-ed.develop.lightning.force.com/lightning/r/Course__c/a01gK00000MyJ4QAF/related/Course_Offerings_/view

Search...

Training Manageme... Home Reports Dashboards Courses Course Offerings Enrollments * Test Participant | Contact

Courses > Salesforce Administration Basics

Course Offerings

New Change Owner

1 item • Updated a few seconds ago

Offering Number
1 CO-0001

Step 2: Check Course Offering → Enrollments

Home | Salesforce

CO-0001 | Course Offering | Sales

https://orgfarm-9162e314b7-dev-ed.develop.lightning.force.com/lightning/r/Course_Offering__c/a02gK000006MwebQAC/view

Search...

Training Management

Home Reports Dashboards Courses Course Offerings Enrollments Test Participant | Contact

Course Offering
CO-0001

New Contact Edit New Opportunity

Related Details

Enrollments (1) New

Enrollment Number
ENR-00001

View All

Activity

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.