

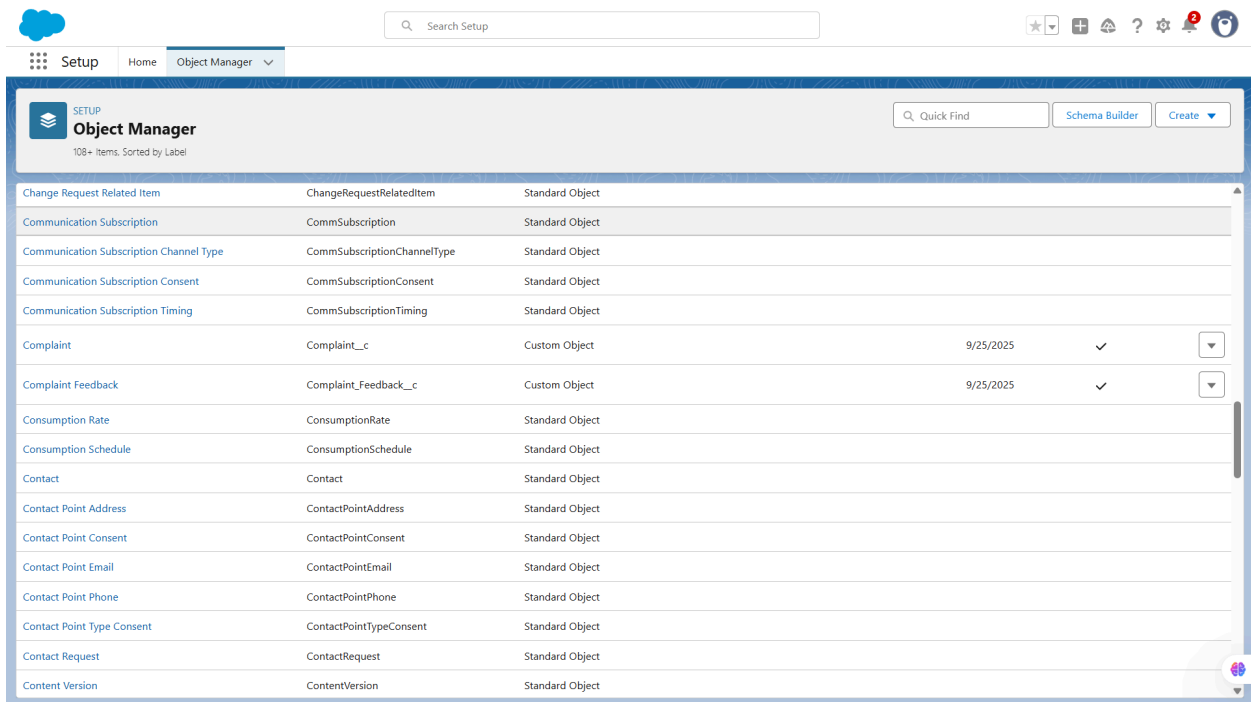
Phase 3: Data Modeling & Relationships

1. Standard & Custom Objects

- **Use Case:**

Standard objects like **Cases**, **Contacts**, **Accounts** will handle customer and complaint info. But since your CRM is focused on complaints, we'll also create **Custom Objects** like:

1. *Complaint* → to log complaint details.
2. *Complaint Feedback* → to track customer feedback after resolution.



The screenshot shows the Salesforce Setup interface, specifically the Object Manager section. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar labeled 'Search Setup' is visible. The Object Manager header shows '108+ Items, Sorted by Label'. The main table lists various objects, including standard and custom objects. The 'Complaint' and 'Complaint Feedback' objects are highlighted as custom objects created on 9/25/2025.

Object Name	API Name	Object Type	Created Date	Status	Actions
Change Request Related Item	ChangeRequestRelatedItem	Standard Object			
Communication Subscription	CommSubscription	Standard Object			
Communication Subscription Channel Type	CommSubscriptionChannelType	Standard Object			
Communication Subscription Consent	CommSubscriptionConsent	Standard Object			
Communication Subscription Timing	CommSubscriptionTiming	Standard Object			
Complaint	Complaint__c	Custom Object	9/25/2025	✓	▼
Complaint Feedback	Complaint_Feedback__c	Custom Object	9/25/2025	✓	▼
Consumption Rate	ConsumptionRate	Standard Object			
Consumption Schedule	ConsumptionSchedule	Standard Object			
Contact	Contact	Standard Object			
Contact Point Address	ContactPointAddress	Standard Object			
Contact Point Consent	ContactPointConsent	Standard Object			
Contact Point Email	ContactPointEmail	Standard Object			
Contact Point Phone	ContactPointPhone	Standard Object			
Contact Point Type Consent	ContactPointTypeConsent	Standard Object			
Contact Request	ContactRequest	Standard Object			
Content Version	ContentVersion	Standard Object			

2. Fields

- **Use Case:**

Each object needs specific fields. For example:

1. *Complaint Feedback*: Rating (Number), Feedback Comments (Text Area).

SETUP > OBJECT MANAGER

Complaint Feedback

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
Complaint	Complaint__c	Lookup(Complaint)		✓
Complaint Feedback Number	Name	Auto Number		✓
Created By	CreatedById	Lookup(User)		
Customer	Customer__c	Lookup(Contact)		✓
Feedback Comments	Feedback_Comments__c	Long Text Area(32768)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Rating	Rating__c	Picklist		
Resolution Time	Resolution_Time__c	Number(18, 0)		

3. Record Types

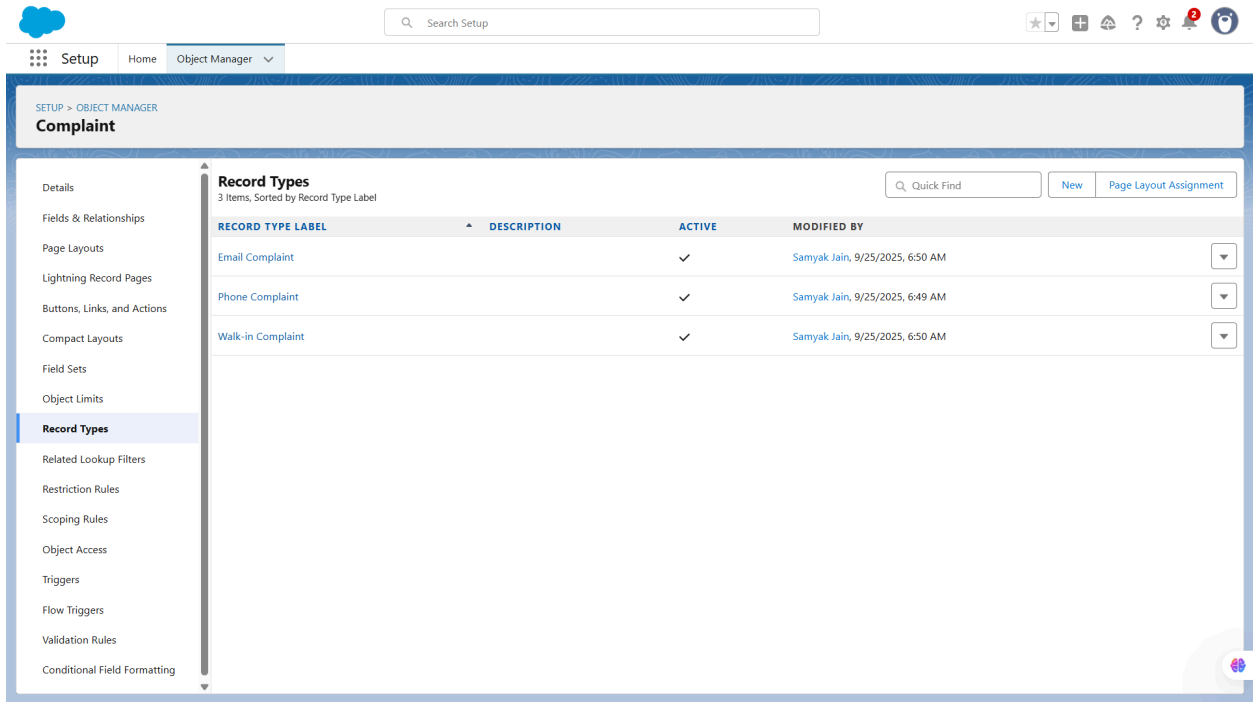
- **Use Case:**

Suppose complaints come from **different channels** (Phone, Email, Walk-in). We may need different page layouts and picklist values per channel. Record Types let us customize.

- **Action Steps:**

1. Go to Object Manager → Complaint → Record Types → New.

2. Create *Phone Complaint, Email Complaint, Walk-in Complaint*.



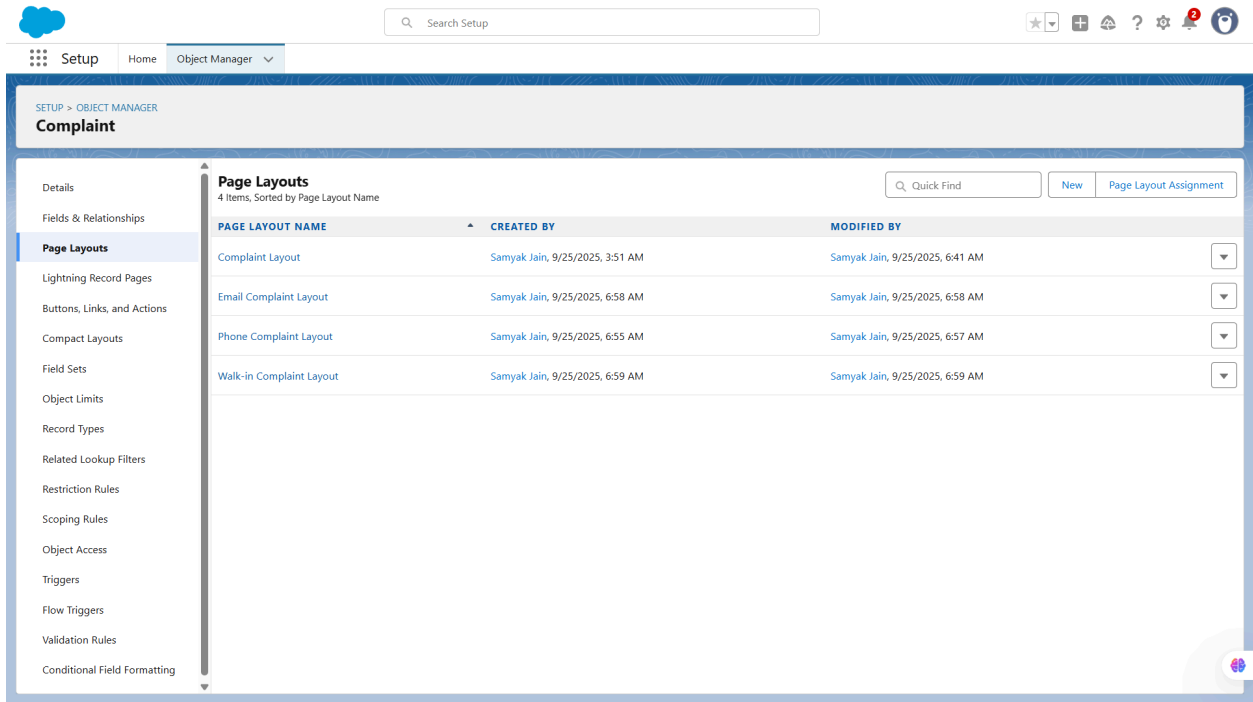
The screenshot shows the Salesforce Setup interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager'. Below this, the breadcrumb trail reads 'SETUP > OBJECT MANAGER' and the page title is 'Complaint'. A left sidebar contains a list of setup options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types (highlighted), Related Lookup Filters, Restriction Rules, Scoping Rules, Object Access, Triggers, Flow Triggers, Validation Rules, and Conditional Field Formatting. The main content area is titled 'Record Types' with a subtitle '3 Items, Sorted by Record Type Label'. It includes a 'Quick Find' search bar and buttons for 'New' and 'Page Layout Assignment'. A table lists three record types:

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
Email Complaint		✓	Samyak Jain, 9/25/2025, 6:50 AM
Phone Complaint		✓	Samyak Jain, 9/25/2025, 6:49 AM
Walk-in Complaint		✓	Samyak Jain, 9/25/2025, 6:50 AM

4. Page Layouts

- Use Case:

- Phone complaints may need *Call Duration* field.
- Email complaints may need *Email Subject* field.
Different layouts per record type keep things clean.



The screenshot shows the Salesforce Setup interface for the 'Complaint' object. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts (selected), 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, Flow Triggers, Validation Rules, and Conditional Field Formatting. The main content area is titled 'Page Layouts' and shows a table of 4 items, sorted by Page Layout Name. The table has columns for PAGE LAYOUT NAME, CREATED BY, and MODIFIED BY. The items listed are Complaint Layout, Email Complaint Layout, Phone Complaint Layout, and Walk-in Complaint Layout, all created by Samyak Jain. There are also buttons for 'Quick Find', 'New', and 'Page Layout Assignment'.

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Complaint Layout	Samyak Jain, 9/25/2025, 3:51 AM	Samyak Jain, 9/25/2025, 6:41 AM
Email Complaint Layout	Samyak Jain, 9/25/2025, 6:58 AM	Samyak Jain, 9/25/2025, 6:58 AM
Phone Complaint Layout	Samyak Jain, 9/25/2025, 6:55 AM	Samyak Jain, 9/25/2025, 6:57 AM
Walk-in Complaint Layout	Samyak Jain, 9/25/2025, 6:59 AM	Samyak Jain, 9/25/2025, 6:59 AM

5. Compact Layouts

- **Use Case:**

When viewing a complaint on mobile or in highlights panel, you don't want 20 fields showing.

Example: Show only *Complaint ID*, *Status*, *Severity*, *Assigned Agent*.

The screenshot shows the Salesforce Setup interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager'. A search bar is also present. The left sidebar lists various setup options, with 'Compact Layouts' selected under the 'Complaint' object. The main content area displays the 'Complaint Compact Layout' details. It includes a table with columns for Label, API Name, and Object Name. The table lists the layout name 'Complaint Compact Layout' and its API name 'Complaint_Compact_Layout'. Below the table, there are buttons for 'Edit', 'Clone', 'Delete', and 'Compact Layout Assignment'. The 'Created By' and 'Modified By' fields are also visible, both showing 'Samyak Jain'.

Complaint Compact Layout

Back to Complaint

Compact Layout Detail

Label	API Name	Object Name
Complaint Compact Layout	Complaint_Compact_Layout	Complaint

Created By: Samyak Jain, 9/25/2025, 7:03 AM

Modified By: Samyak Jain, 9/25/2025, 7:03 AM

6. Schema Builder

- **Use Case:**

Helps visualize all objects and their relationships in one place.

Example: Complaint → related to Contact (lookup), Complaint Feedback → related to Complaint (lookup).

Setup | Home | Object Manager

Search Setup

Setup > OBJECT MANAGER

Complaint

Details

Fields & Relationships
12 Items, Sorted by Field Label

Quick Find: [] New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED	
Assigned To	Assigned_To__c	Lookup(User)		✓	▼
Complaint Name	Name	Text(80)		✓	▼
Contact	Contact__c	Lookup(Contact)		✓	▼
Created By	CreatedBy	Lookup(User)			
Customer Name	Customer_Name__c	Lookup(User, Group)		✓	▼
Description	Description__c	Long Text Area(32768)			▼
Last Modified By	LastModifiedBy	Lookup(User)			
Owner	OwnerId	Lookup(User, Group)		✓	
Priority	Priority__c	Picklist			▼
Record Type	RecordTypeId	Record Type		✓	
Status	Status__c	Picklist			▼
Subject	Subject__c	Text Area(255)			▼

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Object Access

Triggers

Flow Triggers

Validation Rules

Conditional Field Formatting

- **Master-Detail:** Complaint Feedback → Complaint (Feedback depends on Complaint).

Setup | Home | Object Manager

Search Setup

Setup > OBJECT MANAGER

Complaint Feedback

Details

Fields & Relationships
8 Items, Sorted by Field Label

Quick Find: [] New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED	
Complaint	Complaint__c	Master-Detail(Complaint)		✓	▼
Complaint Feedback Number	Name	Auto Number		✓	▼
Created By	CreatedBy	Lookup(User)			
Customer	Customer__c	Lookup(Contact)		✓	▼
Feedback Comments	Feedback_Comments__c	Long Text Area(32768)			▼
Last Modified By	LastModifiedBy	Lookup(User)			
Rating	Rating__c	Picklist			▼
Resolution Time	Resolution_Time__c	Number(18, 0)			▼

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Object Access

Triggers

Flow Triggers

Validation Rules

Conditional Field Formatting

- **Hierarchical:** Only for User object, e.g., assigning complaint manager.

8. Junction Objects

- **Use Case:**

If one complaint can involve **multiple products** and a product can appear in multiple complaints, create a **Complaint_Product__c** junction object.

The screenshot shows the Salesforce Setup interface for the 'Complaint Product' junction object. The left sidebar contains a navigation menu with options like 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, Flow Triggers, Validation Rules, and Conditional Field Formatting. The main content area is titled 'Fields & Relationships' and shows a table with 5 items, sorted by Field Label. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The items listed are Complaint, Complaint_Product__c Name, Created By, Last Modified By, and Product.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Complaint	Complaint__c	Master-Detail(Complaint)		✓
Complaint_Product__c Name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Product	Product__c	Master-Detail(Product)		✓

9. External Objects

- **Use Case:**

Suppose complaints are logged in an external ERP system. You can connect via Salesforce Connect to expose that external data inside Salesforce without duplication.
