

Phase 3: Data Modeling & Relationships

Goal of Phase 3

To design and configure the **data model** in Salesforce for managing **customers, telecom plans, and service requests**. This includes creating objects, fields, relationships, and layouts that support the real-time telecom use cases.

1. Standard & Custom Objects

Standard Objects

- **User** → For Agents and Managers who handle requests.

Custom Objects

1. **Customer__c** → Stores customer details and SIM information.
 2. **Plan__c** → Stores telecom plan details (price, data, validity).
 3. **ServiceRequest__c** → Tracks service requests such as activation, complaints, or cancellations.
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2. Fields

Customer__c

- Phone (Phone)
- Email (Email)
- SIM Number (Text, 20)
- Status (Picklist: Active, Inactive, Suspended)
- Region (Picklist: East, West, North, South)

Plan__c

- Price (Currency)
- Validity (Number, 3 digits)
- Data Limit (Number, 3 digits, GB)
- Plan Type (Picklist: Prepaid, Postpaid, Broadband)

ServiceRequest__c

- Request Type (Picklist: Activation, Cancellation, Network Issue, Billing)
- Status (Picklist: New, In Progress, Resolved, Cancelled)
- Priority (Picklist: High, Medium, Low)

- Description (Long Text Area)

3. Relationships

- **Customer** → **Plan** → *Lookup* (a customer subscribes to a plan).
- **ServiceRequest** → **Customer** → *Lookup* (each request belongs to a customer).

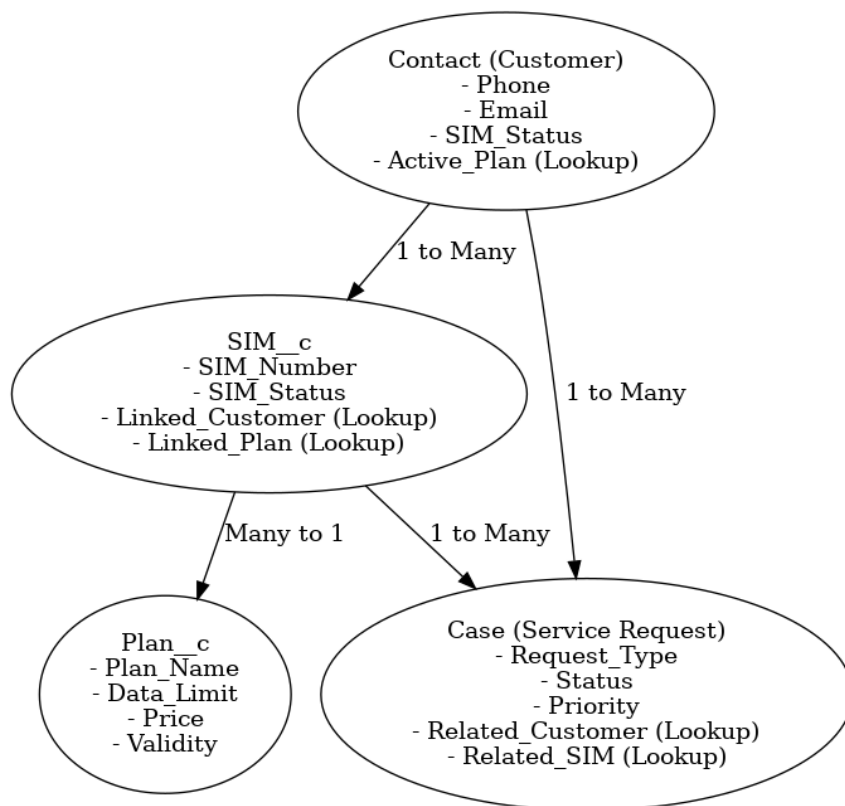
4. Page Layouts

- **Customer Layout** → Phone, Email, SIM Number, Status, Region.
- **Plan Layout** → Price, Validity, Data Limit, Plan Type.
- **Service Request Layout** → Request Type, Status, Priority, Description + related Customer.

5. Schema Builder

Schema Builder used to visualize objects and their relationships:

- Customer__c linked to Plan__c (Lookup).
- ServiceRequest__c linked to Customer__c (Lookup).



6. Record Types

Record Types (ServiceRequest__c)

Created **different record types** to simplify request handling:

- **Activation Request** → For SIM activations.
- **Complaint Request** → For issues like network/billing.
- **Cancellation Request** → For SIM termination.

This helps agents capture the right type of request quickly.

7.Compact Layouts

Optimized for Salesforce Mobile:

- **Customer__c Compact Layout** → Shows Name, Phone, SIM Number, Status.

The screenshot shows the Salesforce Setup interface. The left sidebar contains a navigation menu with options: Setup, Home, Object Manager, Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts (highlighted), Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area is titled 'Customer Compact Layout' and includes a 'Back to Customer Compact Layouts' link. Below this, the 'Compact Layout Detail' section shows the layout configuration for the 'Customer' object. The layout includes fields: Name, Phone, SIM Number, and Status. The 'Created By' and 'Modified By' fields are both set to 'savitri koparde' on 9/21/2025 at 11:48 PM. Action buttons for Edit, Clone, Delete, and Compact Layout Assignment are visible.

- **Plan__c Compact Layout** → Shows Name, Price, Plan Type.

The screenshot shows the Salesforce Setup interface for the 'Plan' object. The left sidebar is the same as the previous screenshot, with 'Compact Layouts' highlighted. The main content area is titled 'Plan Compact Layout' and includes a 'Back to Plan' link. Below this, the 'Compact Layout Detail' section shows the layout configuration for the 'Plan' object. The layout includes fields: Name, Price, Plan Type, and Plan Name. The 'Created By' and 'Modified By' fields are both set to 'savitri koparde' on 9/22/2025 at 12:21 AM. Action buttons for Edit, Clone, Delete, and Compact Layout Assignment are visible.

- **ServiceRequest__c Compact Layout** → Shows Request Type, Status, Priority.

The screenshot shows the Salesforce interface for configuring a Service Request Compact Layout. The top navigation bar includes the Setup link, Home button, and Object Manager dropdown menu. The main header displays "SETUP > OBJECT MANAGER" and "Service Request". A left sidebar lists various configuration options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts (highlighted), Field Sets, Object Limits, Record Types, and Related Lookup Filters.

The main content area is titled "Service Request Compact Layout" and includes a "Help for this Page" icon. Below the title is a "Back to Service Request" link. The "Compact Layout Detail" section contains a table with the following information:

Label	API Name	Included Fields	Object Name	Created By	Modified By
Service Request Compact Layout	Service_Request_Compact_Layout	Request Type Status Priority Customer	Service Request	savitri koparde, 9/21/2025, 10:10 PM	savitri koparde, 9/21/2025, 10:39 PM

Each row in the table has action buttons: Edit, Clone, Delete, and Compact Layout Assignment.