Lead Management & Task Tracking System
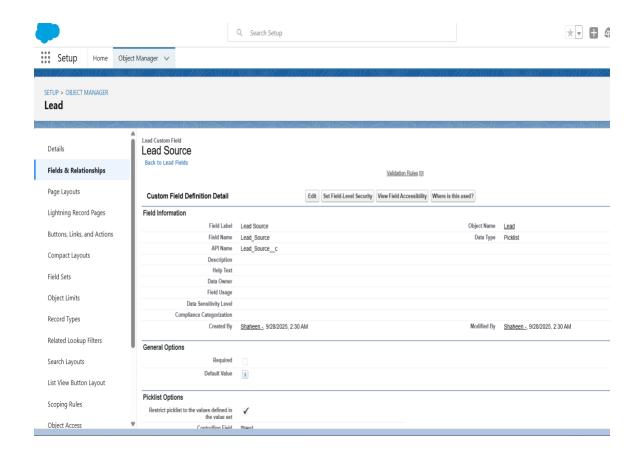## Phase 3: Data Modeling & Relationships

1. Standard & Custom Objects

Salesforce provides standard objects like Lead, Account, Contact, Opportunity, Task, and Event.
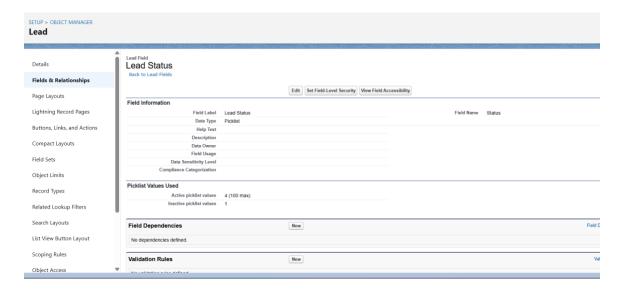
For this project, custom objects ma y be created for project-specific tracking such as 'Client Feedback' or 'Follow-up Notes'.

2. Fields

Custom fields are added to objects to store specific information. Examples:

- Lead Object: Lead Source, Industry, Lead Status
- Task Object: Task Type, Priority, Completion Status
- Client Feedback: Rating, Feedback Date, Comment

Lead Field
Lead Status
Back to Lead Fields

Edit | Set Field-Level Security | View Field Accessibility

Field Information

Field Label	Lead Status
Data Type	Picklist
Help Text	
Description	
Data Owner	
Field Usage	
Data Sensitivity Level	
Compliance Categorization	

Field Name | Status

Picklist Values Used

Active picklist values	4 (100 max)
Inactive picklist values	1

Field Dependencies | New |

No dependencies defined.

Validation Rules | New |

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
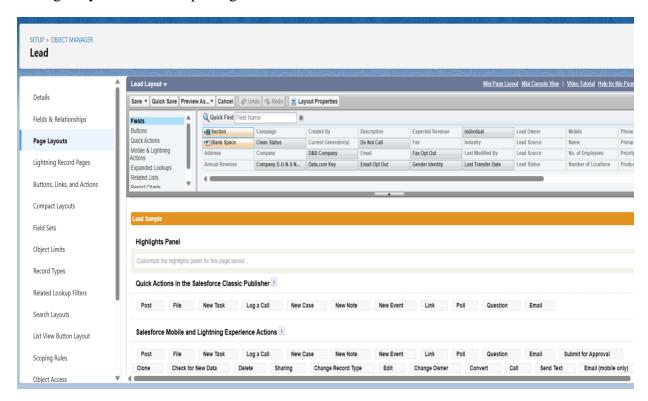Scoping Rules
Object Access

3. Record Types

Record Types allow different page layouts and business processes for the same object.
Example:
- Lead Object: 'Retail Lead', 'Healthcare Lead'

4. Page Layouts

Page layouts define how fields are displayed on object records.
Example: Sales Agent layout shows only relevant fields for daily operations, while Sales Manager layout includes reporting fields.

Lead Layout ▾

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

Mini Page Layout | Mini Console View | Video Tutorial | Help for this Page

Quick Find | Field Name

Fields							
Buttons		Campaign	Created By	Description	Expected Revenue	Individual	Lead Owner	Mobile	Phone
Quick Actions	Section	Clean Status	Current Generator(s)	Do Not Call	Fax	Industry	Lead Source	Name	Primar
Mobile & Lightning Actions	Blank Space	Address	Company	D&B Company	Email	Fax Opt Out	Last Modified By	Lead Source	No. of Employees	Priority
Expanded Lookups		Annual Revenue	Company D-U-N-S N...	Data.com Key	Email Opt Out	Gender Identity	Last Transfer Date	Lead Status	Number of Locations	Produc
Related Lists							
Report Charts							

Lead Sample

Highlights Panel

Customize the highlights panel for this page layout...

Quick Actions in the Salesforce Classic Publisher ⓘ

| Post | File | New Task | Log a Call | New Case | New Note | New Event | Link | Poll | Question | Email |

Salesforce Mobile and Lightning Experience Actions ⓘ

| Post | File | New Task | Log a Call | New Case | New Note | New Event | Link | Poll | Question | Email | Submit for Approval |
| Clone | Check for New Data | Delete | Sharing | Change Record Type | Edit | Change Owner | Convert | Call | Send Text | Email (mobile only) |

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5. Compact Layouts

Compact layouts define the key fields displayed in highlights panel and mobile view.
Example: Lead Name, Company, Lead Status, Priority.

6. Schema Builder

Schema Builder allows visualization of object relationships and fields.
Use it to design and review custom objects, fields, and relationships.

7. Relationships

- Lookup Relationship: Optional link between objects (e.g., Lead → Campaign).
- Master-Detail: Strong parent-child relationship (e.g., Lead → Follow-up Notes).
- Hierarchical: Special relationship for User object (e.g., Sales Agent → Sales Manager).

8. Junction Objects

Used to model many-to-many relationships.
Example: 'Lead Assignment' linking Sales Agents to multiple Leads.

9. External Objects

External objects allow Salesforce to access data stored outside the org.
Example: Accessing client data from an ERP or hospital database.

Deliverables for Phase 3

- List of standard and custom objects
- Custom fields and record types documentation
- Page layouts and compact layouts configuration
- Schema diagram using Schema Builder
- Relationship mappings (Lookup, Master-Detail, Junction, External)