

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 may 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

The screenshot shows the Salesforce Setup interface for a custom field named 'Lead Source' on the 'Lead' object. The left sidebar contains a navigation menu with options like Details, Fields & Relationships (selected), 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, and Object Access. The main content area is titled 'Lead Custom Field' and 'Lead Source'. It includes a 'Back to Lead Fields' link and a 'Validation Rules (0)' link. Below this is the 'Custom Field Definition Detail' section with tabs for 'Edit', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'Field Information' table lists the field's details: Field Label (Lead Source), Field Name (Lead_Source), API Name (Lead_Source__c), Object Name (Lead), and Data Type (Picklist). The 'General Options' section shows 'Required' as an unchecked checkbox and 'Default Value' as an information icon. The 'Picklist Options' section shows 'Restrict picklist to the values defined in the value set' as a checked checkbox. At the bottom, it shows 'Created By' as 'Shaheen' on '9/28/2025, 2:30 AM' and 'Modified By' as 'Shaheen' on '9/28/2025, 2:30 AM'.

Field Label	Lead Source	Object Name	Lead
Field Name	Lead_Source	Data Type	Picklist
API Name	Lead_Source__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Shaheen	Modified By	Shaheen
	9/28/2025, 2:30 AM		9/28/2025, 2:30 AM

SETUP > OBJECT MANAGER

Lead

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

Lead Field

Lead Status

Back to Lead Fields

Edit Set Field-Level Security View Field Accessibility

Field Information

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

Picklist Values Used

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

Field Dependencies

New

Field C

No dependencies defined.

Validation Rules

New

Val

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.

SETUP > OBJECT MANAGER

Lead

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
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Field Sets
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List View Button Layout
Scoping Rules
Object Access

Lead Layout

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

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

Quick Find Field Name

Fields

Section	Campaign	Created By	Description	Expected Revenue	Individual	Lead Owner	Mobile	Phone
Blank Space	Clean Status	Current Generator(s)	Do Not Call	Fax	Industry	Lead Source	Name	Primary
Address	Company	D&B Company	Email	Fax Opt Out	Last Modified By	Lead Source	No. of Employees	Priority
Annual Revenue	Company D-U-N-S N...	Data.com Key	Email Opt Out	Gender Identity	Last Transfer Date	Lead Status	Number of Locations	Product

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)

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)