

## Phase 3 – Data Modeling & Relationships

### Objective:

Create and configure custom objects, fields, relationships, and layouts to model the Event Management process in Salesforce.

---

### Custom Objects

Three custom objects were created: **Event Record**, **Ticket**, and **Vendor**.

Object	Description	Record Name
Event Record	Stores all corporate event records	Event Name (Text)
Ticket	Stores ticket/attendee details	Ticket ID (Auto Number)
Vendor	Stores vendor and sponsor details	Vendor Name (Text)

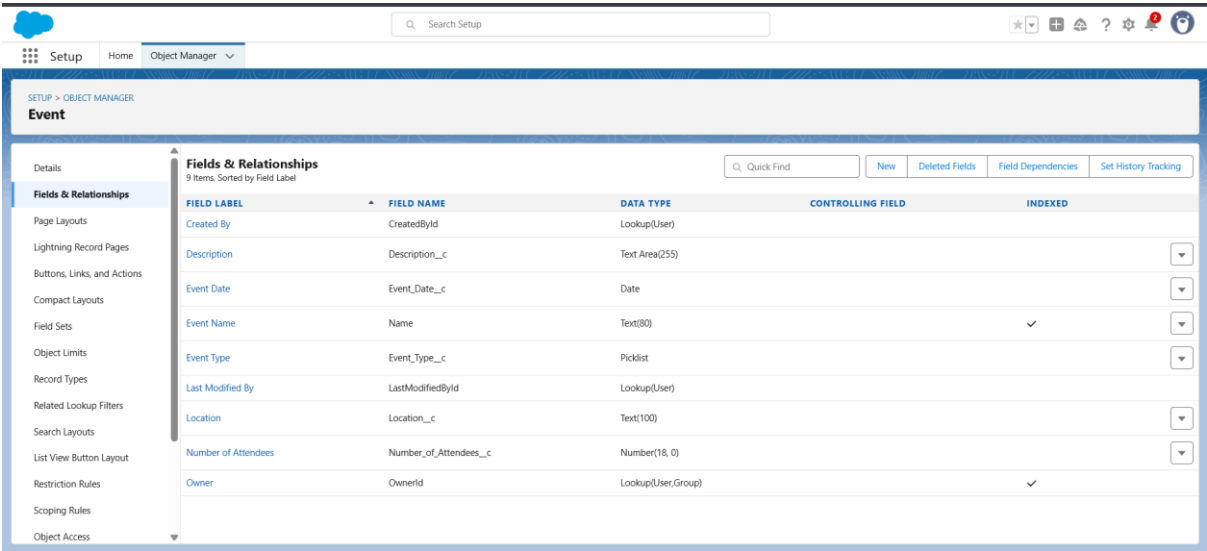
---

### Fields

#### #Event Record Fields

Field Label	Data Type	Description	Always Require Value	Help Text
Event Name	Text	Name of the event	<input checked="" type="checkbox"/> Yes	—
Event Date	Date	Date of the event	<input checked="" type="checkbox"/> Yes	“Select the date of the event.”
Location	Text	City or venue of the event	<input checked="" type="checkbox"/> Yes	“Enter the city or venue of the event.”
Event Type	Picklist	Type of the event	<input checked="" type="checkbox"/> Yes	“Select the type of event.”
Number of Attendees	Number	Expected number of attendees	<input checked="" type="checkbox"/> No	“Enter expected number of attendees.”
Description	Text Area	Brief description of the event	<input checked="" type="checkbox"/> No	“Enter a brief description of the event.”

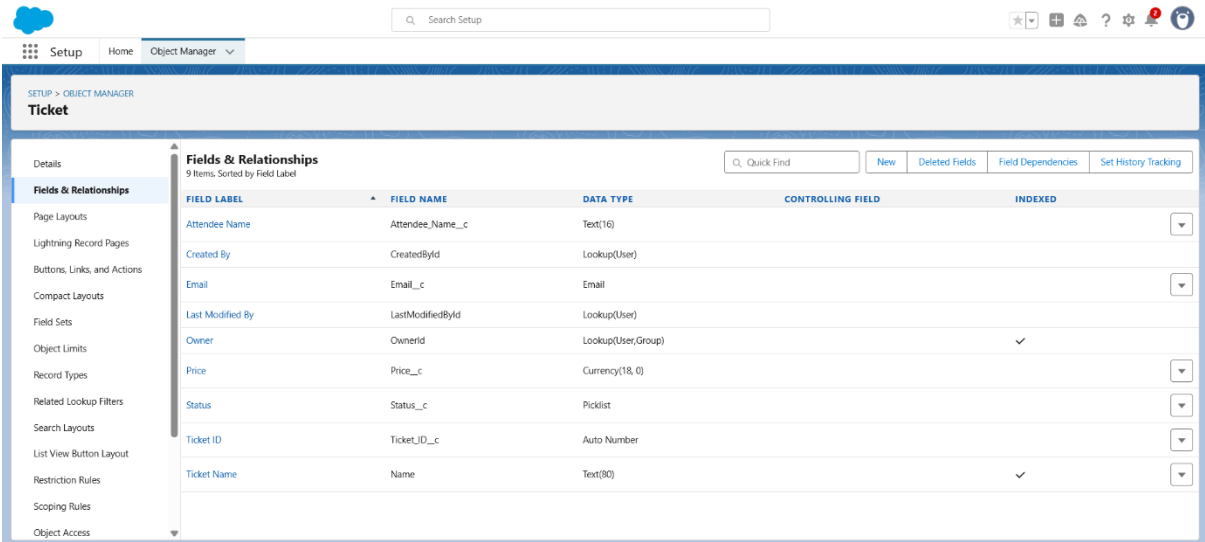
Screenshot:



#Ticket Fields

Field Label	Data Type	Description	Always Require Value	Help Text
Ticket ID	Auto Number	Unique ticket identifier	<input checked="" type="checkbox"/> Yes	"Salesforce generates automatically."
Attendee Name	Text	Full name of the attendee	<input checked="" type="checkbox"/> Yes	"Enter full name of the attendee."
Price	Currency	Ticket price	<input checked="" type="checkbox"/> Yes	"Enter ticket price."
Email	Email	Attendee email	<input type="checkbox"/> No	"Enter attendee email address."
Status	Picklist	Ticket status	<input checked="" type="checkbox"/> Yes	"Select ticket status: Booked, Cancelled, Checked-in."
Event Record	Master-Detail	Links this ticket to the corresponding Event Record	<input checked="" type="checkbox"/> Yes	"Select the Event Record this ticket is associated with. Deleting the Event will also delete linked tickets."

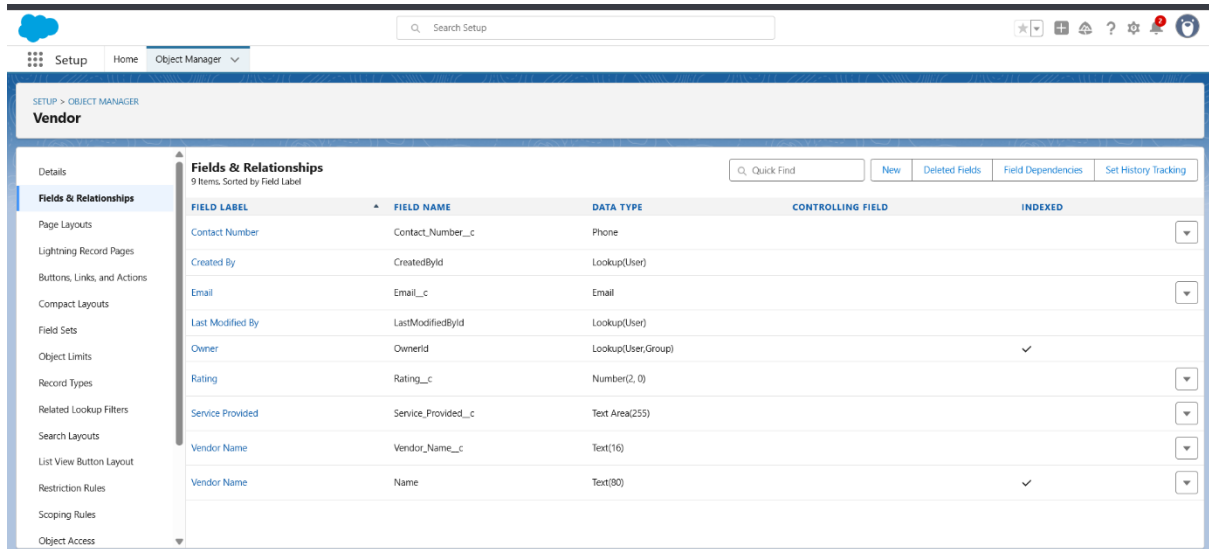
Screenshot:



#Vendor Fields

Field Label	Data Type	Description	Always Require Value	Help Text
Vendor Name	Text	Name of the vendor	<input checked="" type="checkbox"/> Yes	"Enter full name of the vendor."
Contact Number	Phone	Vendor phone	<input checked="" type="checkbox"/> No	"Enter vendor phone number."
Email	Email	Vendor email	<input checked="" type="checkbox"/> No	"Enter vendor email address."
Service Provided	Text Area	Services offered by the vendor	<input checked="" type="checkbox"/> No	"Describe service/vendor provides."
Rating	Number	Vendor rating 1–5	<input checked="" type="checkbox"/> No	"Rate vendor 1–5."
Event Record	Lookup	Associates vendor with an Event Record	<input checked="" type="checkbox"/> No	"Select the Event Record this vendor is supporting."

## Screenshot:



The screenshot shows the Salesforce Setup interface for the 'Vendor' object. The 'Fields & Relationships' tab is selected, displaying a list of 9 fields. The left sidebar contains navigation options like Details, Fields & Relationships, Page Layouts, etc. The top navigation bar includes Setup, Home, and Object Manager. The main content area has a search bar and buttons for New, Deleted Fields, Field Dependencies, and Set History Tracking.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Contact Number	Contact_Number__c	Phone		
Created By	CreatedById	Lookup(User)		
Email	Email__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Rating	Rating__c	Number(2, 0)		
Service Provided	Service_Provided__c	Text Area(255)		
Vendor Name	Vendor_Name__c	Text(16)		
Vendor Name	Name	Text(80)		✓

## 3 Relationships

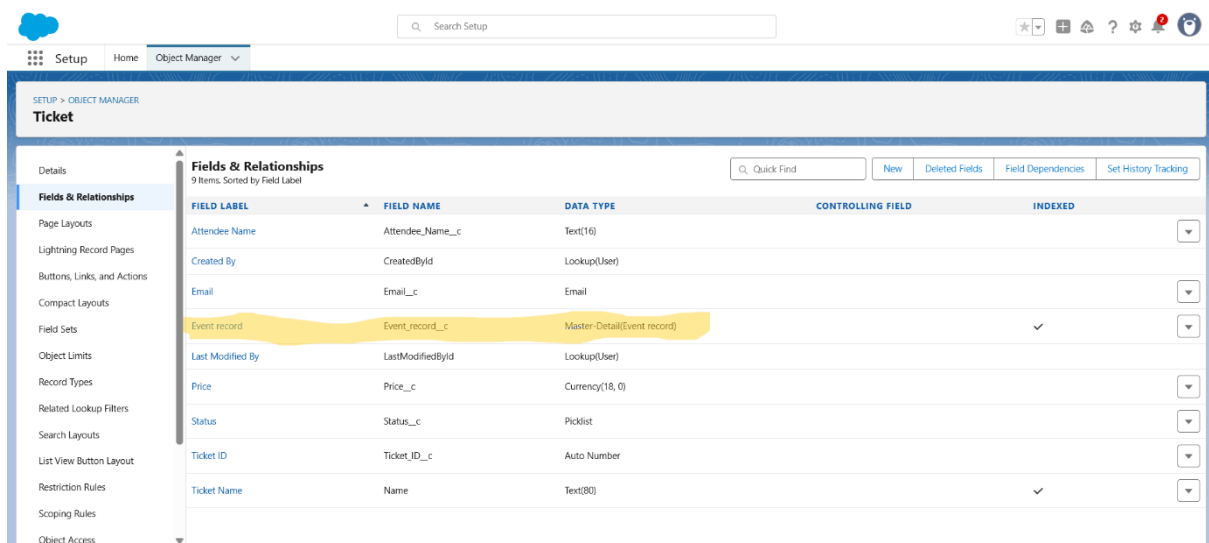
### A. Event Record → Ticket

- **Type:** Master-Detail
- **Purpose:** Each Ticket must belong to one Event Record. Deleting an Event Record deletes its Tickets.

**Field Description:** “Links this ticket to the corresponding Event Record. Each ticket must belong to one event.”

**Help Text:** “Select the Event Record this ticket is associated with. Deleting the Event will also delete linked tickets.”

## Screenshot:



The screenshot shows the Salesforce Setup interface for the 'Ticket' object. The 'Fields & Relationships' tab is selected, displaying a list of 9 fields. The left sidebar contains navigation options like Details, Fields & Relationships, Page Layouts, etc. The top navigation bar includes Setup, Home, and Object Manager. The main content area has a search bar and buttons for New, Deleted Fields, Field Dependencies, and Set History Tracking. The 'Event\_record\_\_c' field is highlighted with a yellow background.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Attendee Name	Attendee_Name__c	Text(16)		
Created By	CreatedById	Lookup(User)		
Email	Email__c	Email		
Event record	Event_record__c	Master-Detail(Event record)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Price	Price__c	Currency(18, 0)		
Status	Status__c	Picklist		
Ticket ID	Ticket_ID__c	Auto Number		
Ticket Name	Name	Text(80)		✓

## B. Event Record → Vendor

- **Type:** Lookup
- **Purpose:** Associates a Vendor with an Event Record. Deleting an Event Record does not delete the Vendor.

**Field Description:** “Associates this vendor with a specific Event Record. A vendor may or may not be linked to an event.”

**Help Text:** “Select the Event Record this vendor is supporting.”

### Screenshot:

The screenshot shows the Salesforce Setup interface for the 'Vendor' object. The 'Fields & Relationships' section is active, displaying a list of fields. The 'Event record' field is highlighted in yellow. The table below shows the details of the fields.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Contact Number	Contact_Number__c	Phone		
Created By	CreatedById	Lookup(User)		
Email	Email__c	Email		
Event record	Event_record__c	Lookup(Event record)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User, Group)		✓
Rating	Rating__c	Number(2, 0)		
Service Provided	Service_Provided__c	Text Area(255)		
Vendor Name	Vendor_Name__c	Text(16)		
Vendor Name	Name	Text(80)		✓

## 4 Page Layouts

**Purpose:** Arrange fields, sections, and related lists for user-friendly record pages.

### Objects and Sections:

#### Event Record Layout:

- Event Name, Event Date, Location, Event Type, Number of Attendees, Description
- Related Lists: Tickets, Vendors

#### Ticket Layout:

- Ticket ID, Attendee Name, Price, Email, Status, Event Record

#### Vendor Layout:

- Vendor Name, Contact Number, Email, Service Provided, Rating, Event Record

### Screenshot:

## Event Record Layout:

The screenshot shows the Salesforce Setup interface for configuring the Event Record Layout. 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, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules, and Object Access. The main content area is titled 'Event record' and features a 'Event Layout' editor. This editor includes a 'Fields' panel on the left with a search bar and a list of fields (Event Date, Location, Event Name, Number of Attendees, Created By, Event Type, Owner, Description, Last Modified By). A 'Quick Find' field is also present. The layout preview shows a 'Event record Sample' with a 'Highlights Panel' and 'Quick Actions in the Salesforce Classic Publisher' section. Below these are 'Salesforce Mobile and Lightning Experience Actions' and a 'Event record Detail' section. The bottom of the page shows 'Standard Buttons' and 'Custom Buttons'.

## Ticket Layout:

The screenshot shows the Salesforce Setup interface for configuring the Ticket Layout. The left sidebar is identical to the Event Record Layout page. The main content area is titled 'Ticket' and features a 'Ticket Layout' editor. The 'Fields' panel on the left lists fields (Email, Status, Event record, Ticket ID, Attendee Name, Last Modified By, Ticket Name, Price, Created By). The layout preview shows a 'Ticket Sample' with a 'Highlights Panel' and 'Quick Actions in the Salesforce Classic Publisher' section. Below these are 'Salesforce Mobile and Lightning Experience Actions' and a 'Ticket Detail' section. The bottom of the page shows 'Standard Buttons' and 'Custom Buttons'.

## Vendor Layout:

The screenshot shows the Salesforce Setup interface for configuring the Vendor Layout. The left sidebar is identical to the previous pages. The main content area is titled 'Vendor' and features a 'Vendor Layout' editor. The 'Fields' panel on the left lists fields (Email, Rating, Event record, Service Provided, Contact Number, Last Modified By, Vendor Name, Created By). The layout preview shows a 'Vendor Sample' with a 'Highlights Panel' and 'Quick Actions in the Salesforce Classic Publisher' section. Below these are 'Salesforce Mobile and Lightning Experience Actions' and a 'Vendor Detail' section. The bottom of the page shows 'Standard Buttons' and 'Custom Buttons'.

# 5 Compact Layouts

## Object Fields in Compact Layout

Event Record Event Name, Event Date, Location

Ticket Ticket ID, Attendee Name, Status

Vendor Vendor Name, Event Record

## Screenshot:

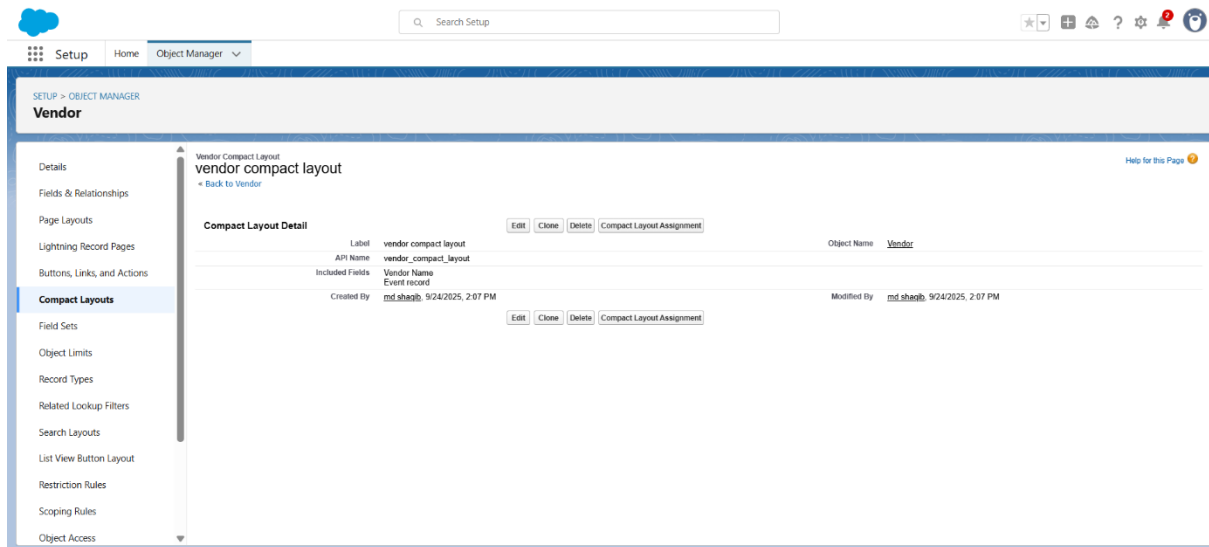
Event Record :-

The screenshot shows the Salesforce Setup interface for configuring the Compact Layout for the 'Event record' object. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, and Compact Layouts (which is currently selected). The main content area displays the 'Event record Compact Layout' configuration. It includes a 'Compact Layout Detail' section with fields for Label, API Name, Object Name, Included Fields, and Created/Modified By. The 'Included Fields' section lists the fields included in the layout: Event Name, Event Date, and Location. The 'Created By' and 'Modified By' fields are populated with the user 'md shaikh' and the date '9/24/2025, 2:08 PM'.

Tickets:-

The screenshot shows the Salesforce Setup interface for configuring the Compact Layout for the 'Ticket' object. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, and Compact Layouts (which is currently selected). The main content area displays the 'Ticket Compact Layout' configuration. It includes a 'Compact Layout Detail' section with fields for Label, API Name, Object Name, Included Fields, and Created/Modified By. The 'Included Fields' section lists the fields included in the layout: Ticket ID, Attendee Name, and Status. The 'Created By' and 'Modified By' fields are populated with the user 'md shaikh' and the date '9/24/2025, 2:11 PM'.

Vendor:-



## Schema Builder

**Purpose:** Visual diagram of objects and relationships.

- Event Record (parent) → Master-Detail to Ticket
- Event Record → Lookup to Vendor

**Screenshot:**

