# Phase III: Data Modeling and Relationships

AURA EVENTS & SPONSOR:
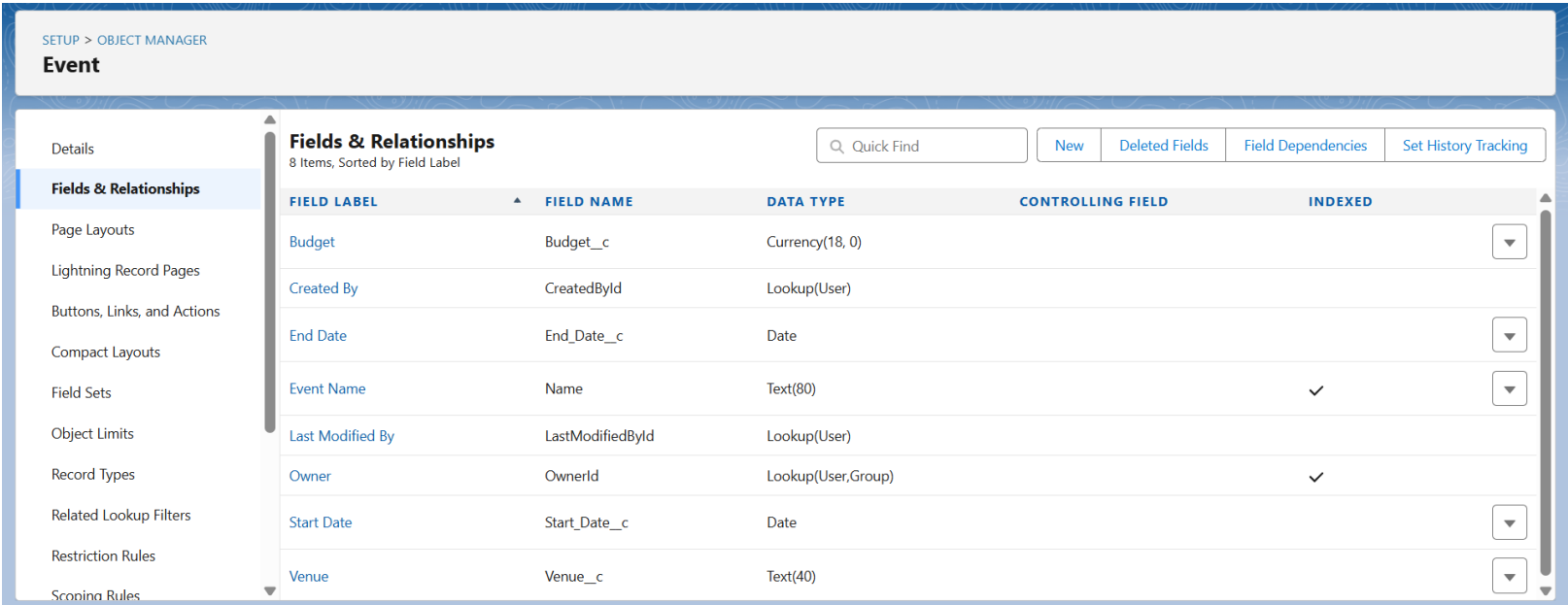## College Events & Sponsor Management

Standard & Custom Objects

- **Explanation:** The project leverages a hybrid model using both existing Salesforce objects and new custom objects to fit specific business needs.
- **Salesforce Path:** Setup → Object Manager
- **Data Model:**
  - **Standard Objects Used:** Campaign (for marketing promotions), Account (for sponsors), and Contact (for sponsor contacts).
  - **Custom Objects Created:**
    - Event: The primary object for tracking all event details.
    - Sponsor: A custom object to manage sponsorship commitments, separate from standard Accounts for project-specific data.
    - Vendor: A custom object to manage all vendor contracts.
    - Sponsor Invoice: A custom object for the finance team to track invoices related to sponsorships.
    - Promotion Request: A custom object for the marketing team to manage their event-related tasks.
    - Sponsorship Contribution: A **junction object** to create a many-to-many relationship between Sponsor and Event records.
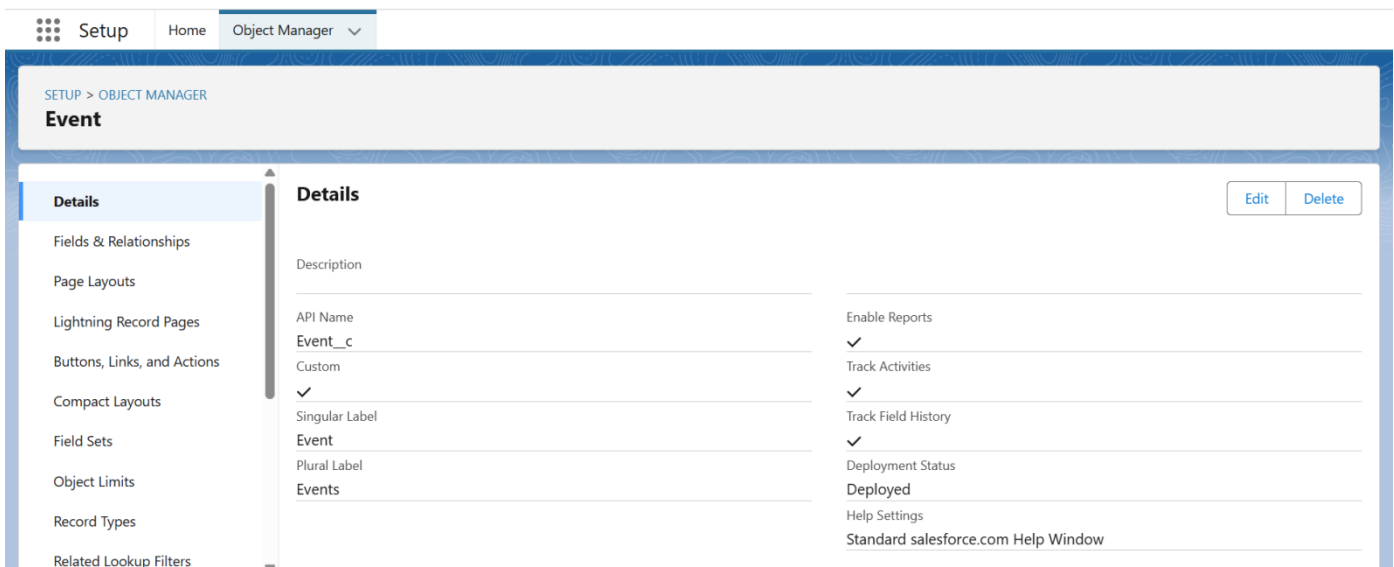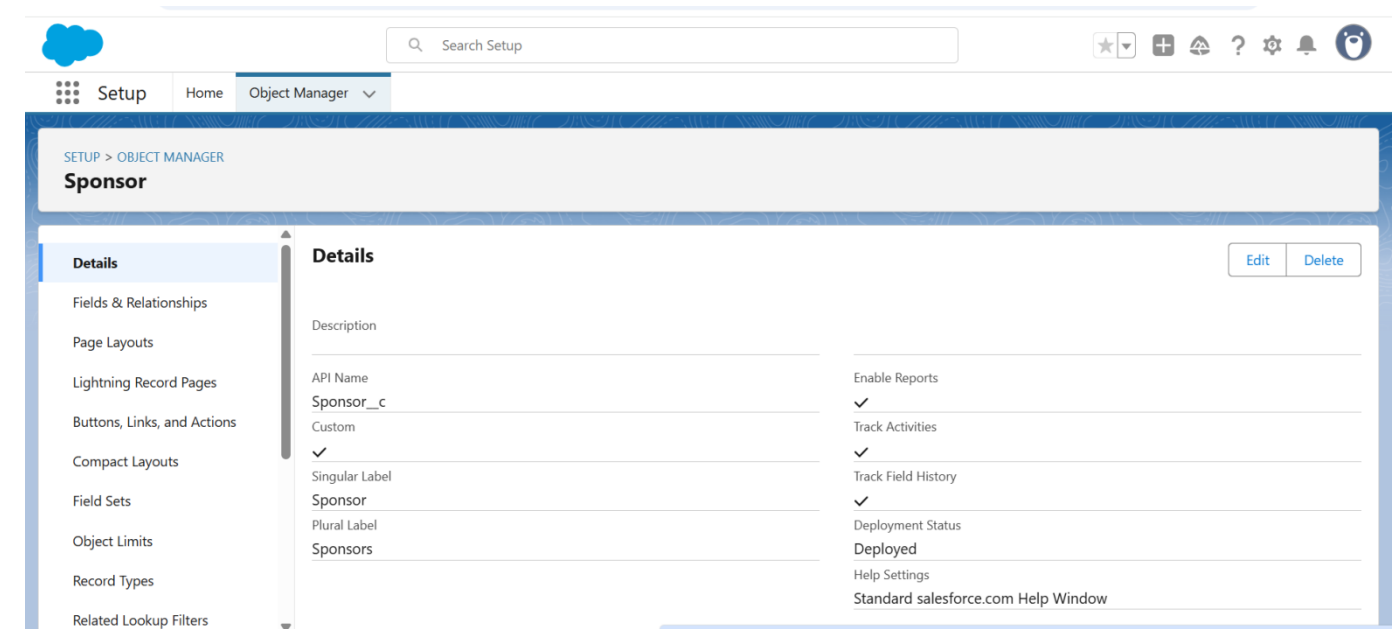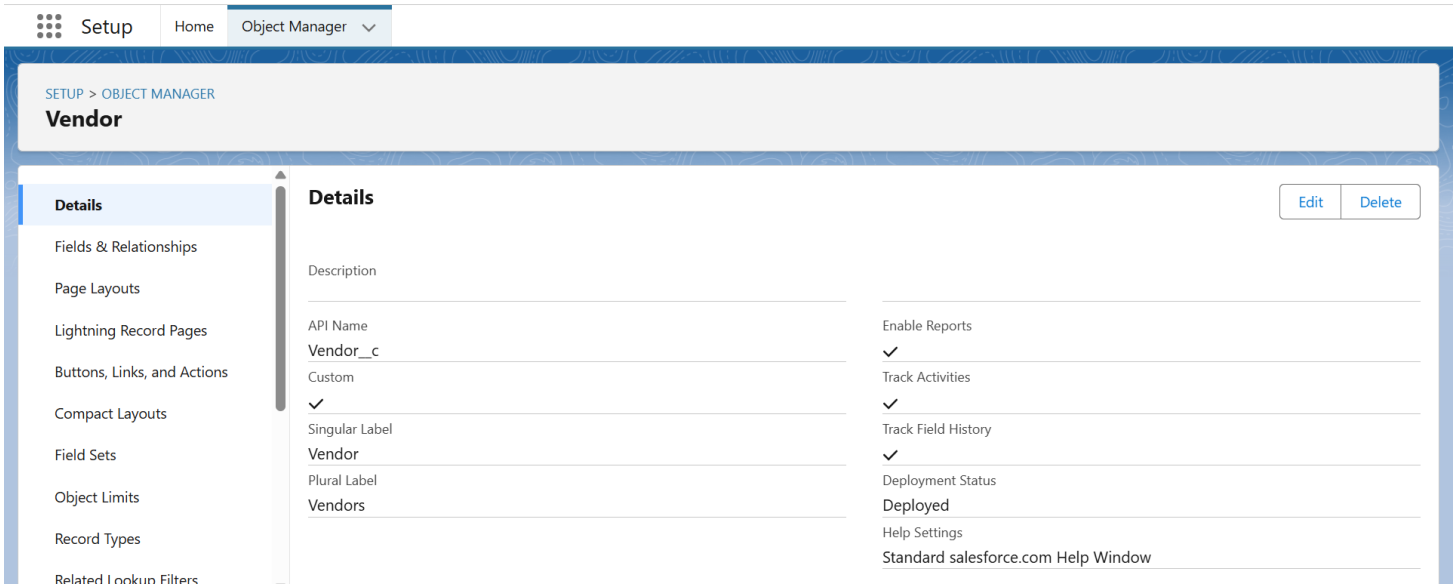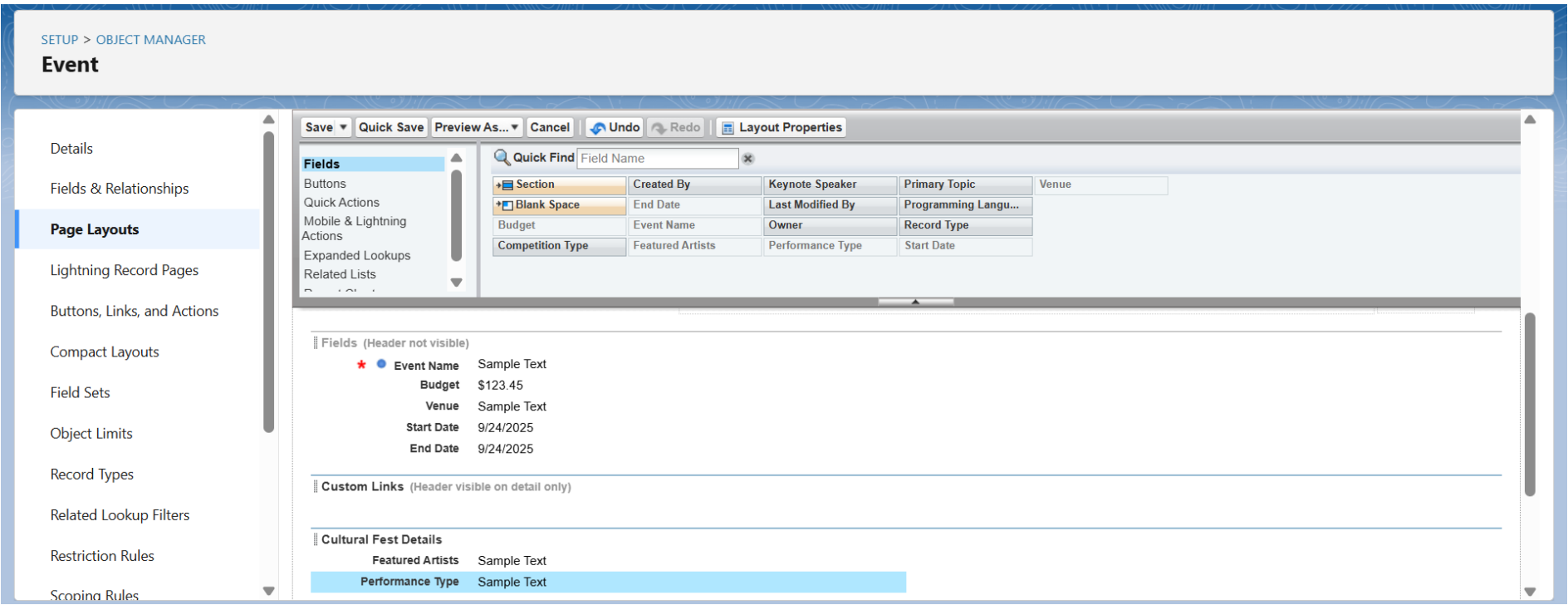
Fields & Relationships

- **Explanation:** Custom fields were created for each object to store specific data points, and relationships were built to connect them.
- **Salesforce Path:** Setup → Object Manager → Select Object → Fields & Relationships
- **Procedure & Configuration:**

  - **Custom Fields:**

    - **Event Object:** Venue (Text), Budget (Currency), Start Date (Date), End Date (Date), Featured Artists (Text Area, for cultural events), Performance Type (Multi-Select Picklist, for cultural events), Competition Type (Picklist, for tech fests), Keynote Speaker (Text, for academic events), Primary Topic (Text, for academic events).
    - **Sponsor Object:** Sponsorship Amount (Currency), Sponsorship Tier (Picklist), Status (Picklist).
    - **Vendor Object:** Service Type (Text), Contract Amount (Currency), Payment Due Date (Date).
    - **Sponsor Invoice Object:** Invoice Amount (Currency), Due Date (Date), Payment Status (Picklist), Invoice Number (Auto Number).
    - **Promotion Request Object:** Promotion Type (Picklist), Status (Picklist)

  - **Relationships (Lookup):**

  - Sponsor connected to Event.
  - Vendor connected to Event.
  - Sponsor Invoice connected to Sponsor.
  - Promotion Request connected to Event.

| 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 |

Fields & Relationships
8 Items, Sorted by Field Label

Quick Find · New · Deleted Fields

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD
Created By	CreatedById	Lookup(User)	
Last Modified By	LastModifiedById	Lookup(User)	
Owner	OwnerId	Lookup(User,Group)	
Related Event	Related_Event__c	Lookup(Event)	
Sponsor Name	Name	Text(80)	
Sponsorship Amount	Sponsorship_Amount__c	Currency(18, 0)	
Sponsorship Tier	Sponsorship_Tier__c	Picklist	
Status	Status__c	Picklist	

| Details |
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| Scoping Rules |

Fields & Relationships
8 Items, Sorted by Field Label

Quick Find · New · Deleted Fields

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD
Contract Amount	Contract_Amount__c	Currency(18, 0)	
Created By	CreatedById	Lookup(User)	
Last Modified By	LastModifiedById	Lookup(User)	
Owner	OwnerId	Lookup(User,Group)	
Payment Due Date	Payment_Due_Date__c	Date	
Related Event	Related_Event__c	Lookup(Event)	
Service Type	Service_Type__c	Text(20)	
Vendor Name	Name	Text(80)	

Record Types & Page Layouts

Explanation: Record types and page layouts were configured to provide a tailored user experience based on the type of event. Compact layouts were set up to provide a quick summary of key information**.**

- **Salesforce Path:** Setup → Object Manager → Event → Record Types and Page Layouts
- **Procedure & Configuration:**
    - **Record Types:** Three record types were created for the Event object: Cultural Fest, Tech Fest, and Academic Professional Event.
    - **Page Layouts:**
        - Three corresponding page layouts were created, each displaying fields relevant to its record type (e.g., Featured Artists on the Cultural Fest Layout).
        - Related lists for Sponsors and Vendors were added to all event layouts.

| 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 |

Record Types
3 Items, Sorted by Record Type Label

Quick Find · New · Page Layout Assignment

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY	
Cultural Fest	Used for cultural events like dance, music, and art festivals	✓	Shraddha Asati, 9/24/2025, 1:10 AM	▼
Professional/Academic	Used for academic events like career fair, workshops, guest lectures	✓	Shraddha Asati, 9/24/2025, 1:16 AM	▼
Tech Fest	Used for technology-focused events like hackathons and coding competitions	✓	Shraddha Asati, 9/24/2025, 1:12 AM	▼

| Details |
| Fields & Relationships |
| **Page Layouts** |
| Lightning Record Pages |
| Buttons, Links, and Actions |
| Compact Layouts |
| Field Sets |
| Object Limits |
| Record Types |
| Related Lookup Filters |

Page Layouts
4 Items, Sorted by Page Layout Name

Quick Find · New · Page Layout Assignment

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY	
Academic/Professional Event Layout	Shraddha Asati, 9/24/2025, 1:38 AM	Shraddha Asati, 9/24/2025, 1:44 AM	▼
Cultural Fest Layout	Shraddha Asati, 9/24/2025, 1:17 AM	Shraddha Asati, 9/24/2025, 1:32 AM	▼
Event Layout	Shraddha Asati, 9/23/2025, 1:56 AM	Shraddha Asati, 9/24/2025, 1:29 AM	▼
Tech Fest Layout	Shraddha Asati, 9/24/2025, 1:36 AM	Shraddha Asati, 9/24/2025, 1:42 AM	▼

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

Fields
Buttons
Quick Actions
Mobile & Lightning Actions
Expanded Lookups
Related Lists

🔍 Quick Find | Field Name | ✖

➕🗔 Section	Created By	Keynote Speaker	Primary Topic	Venue
➕🗔 Blank Space	End Date	Last Modified By	Programming Langu...	
Budget	Event Name	Owner	Record Type	
Competition Type	Featured Artists	Performance Type	Start Date	

Fields (Header not visible)

★ ● Event Name	Sample Text
Budget	$123.45
Venue	Sample Text
Start Date	9/24/2025
End Date	9/24/2025

Custom Links (Header visible on detail only)

Cultural Fest Details

| Featured Artists | Sample Text |
| Performance Type | Sample Text |

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

Custom: Sales Profile	Event Layout	Event Layout	Event Layout	Event Layout
Custom: Support Profile	Event Layout	Event Layout	Event Layout	Event Layout
Einstein Agent User	Event Layout	Event Layout	Event Layout	Event Layout
Event Coordinator Profile	Event Layout	Cultural Fest Layout	Academic/Professional Event Layout	Tech Fest Layout
Force.com - App Subscription User	Event Layout	Event Layout	Event Layout	Event Layout
Force.com - Free User	Event Layout	Event Layout	Event Layout	Event Layout
Gold Partner User	Event Layout	Event Layout	Event Layout	Event Layout
Identity User	Event Layout	Event Layout	Event Layout	Event Layout
Marketing User	Event Layout	Event Layout	Event Layout	Event Layout
Minimum Access - API Only Integrations	Event Layout	Event Layout	Event Layout	Event Layout
Minimum Access - Salesforce	Event Layout	Event Layout	Event Layout	Event Layout
Partner App Subscription User	Event Layout	Event Layout	Event Layout	Event Layout
Partner Community Login User	Event Layout	Event Layout	Event Layout	Event Layout
Partner Community User	Event Layout	Event Layout	Event Layout	Event Layout
Read Only	Event Layout	Event Layout	Event Layout	Event Layout
Salesforce API Only System Integrations	Event Layout	Event Layout	Event Layout	Event Layout
Silver Partner User	Event Layout	Event Layout	Event Layout	Event Layout
Solution Manager	Event Layout	Event Layout	Event Layout	Event Layout
Sponsorship Manager Profile	Event Layout	Cultural Fest Layout	Academic/Professional Event Layout	Tech Fest Layout
Standard Platform User	Event Layout	Event Layout	Event Layout	Event Layout
Standard User	Event Layout	Event Layout	Event Layout	Event Layout
System Administrator	Event Layout	Cultural Fest Layout	Academic/Professional Event Layout	Tech Fest Layout
Work.com Only User	Event Layout	Event Layout	Event Layout	Event Layout

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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

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

Fields
Buttons
Quick Actions
Mobile & Lightning Actions
Expanded Lookups
Related Lists
Report Charts

🔍 Quick Find | Related List Name | ✖

Activity History	Files	Related Content
Approval History	Groups	Sponsors
Content Deliveries	Notes & Attachments	Vendors
Event History	Open Activities	

Related Lists

Sponsors | New | Change Owner

| Sponsor Name |
| Sample Text |

Vendors | New | Change Owner

| Vendor Name |
| Sample Text |

Compact Layouts

The Main Event Details compact layout was created and assigned as the primary layout for the Event object, ensuring key fields are visible in the highlight panel. The Sponsor and Vendor objects also had their compact layouts configured.

○ **Final Configuration:** When a user creates a new event, they select a record type, which automatically displays the correct page layout and its associated fields.

Event Compact Layouts
Compact Layout Assignment

[Save] [Cancel]

Primary Compact Layout

Select the compact layout to use when this object's records appear as list items in the mobile app.

Primary Compact Layout: [Main Event Details ▾]

Record Type Overrides

This table shows the compact layout assignments for different record types. Use SHIFT + click or click and drag to select a range of adjacent cells. Use CTRL + click to select multiple cells that are not adjacent. Then choose a new compact layout from the dropdown.

Compact Layout to Use: [-- Select Compact Layout -- ▾]   0 Selected   0 Changed

Record Types	Compact Layouts
Cultural Fest	Inherit from Primary
Professional/Academic	Inherit from Primary
Tech Fest	Inherit from Primary

[Save] [Cancel]

SETUP > OBJECT MANAGER
Event

Event Compact Layouts
New Compact Layout

Compact layouts are used in the mobile app and some Chatter feed items to display a record's key fields at a glance. You can select and prioritize up to ten fields for the compact layout, but the number of fields that display may vary based on the device's screen, which record page is being viewed, and the permissions of the user.

Compact Layout Edit   [Save] [Cancel]

Enter Compact Layout Information   ⌐ = Required Information

Label [Main Event Details]

Name [Main_Event_Details] ℹ

Select Compact Layout Fields

Available Fields:
- Competition Type
- Created By
- End Date
- Keynote Speaker
- Last Modified By
- Owner
- Primary Topic
- Record Type

Selected Fields:
- Event Name
- Budget
- Start Date
- Venue

(Add ▶ / Remove ◀) (Top / Up / Down / Bottom)

SETUP > OBJECT MANAGER
Sponsor

Compact Layouts
2 Items, Sorted by Label

[Quick Find]   [New]   [Compact Layout Assignment]

LABEL ▲	API NAME	PRIMARY	MODIFIED BY	LAST MODIFIED	
Sponsor Details	Sponsor_Details	✓	Shraddha Asati	9/24/2025, 3:07 AM	▾
System Default	SYSTEM				

SETUP > OBJECT MANAGER
Vendor

Compact Layout Edit   [Save] [Cancel]

Enter Compact Layout Information   ⌐ = Required Information

Label [Vendor Details]

Name [Vendor_Details] ℹ

Select Compact Layout Fields

Available Fields:
- Created By
- Last Modified By
- Owner

Selected Fields:
- Vendor Name
- Service Type
- Contract Amount
- Payment Due Date
- Related Event

(Add ▶ / Remove ◀) (Top / Up / Down / Bottom)

Use SHIFT + click to select adjacent fields. Use CTRL + click to select an assortment of fields.

Schema Builder

- **Explanation:** The Schema Builder was used as a visual tool to confirm that all objects and their relationships were correctly created and connected.
- **Salesforce Path:** Setup → Quick Find → Schema Builder
- **Procedure & Configuration:**
  - The canvas was loaded with all relevant custom and standard objects.
  - The diagram confirmed that all lookup and master-detail relationships were correctly established, with lines connecting the appropriate objects, confirming the integrity of the data model.
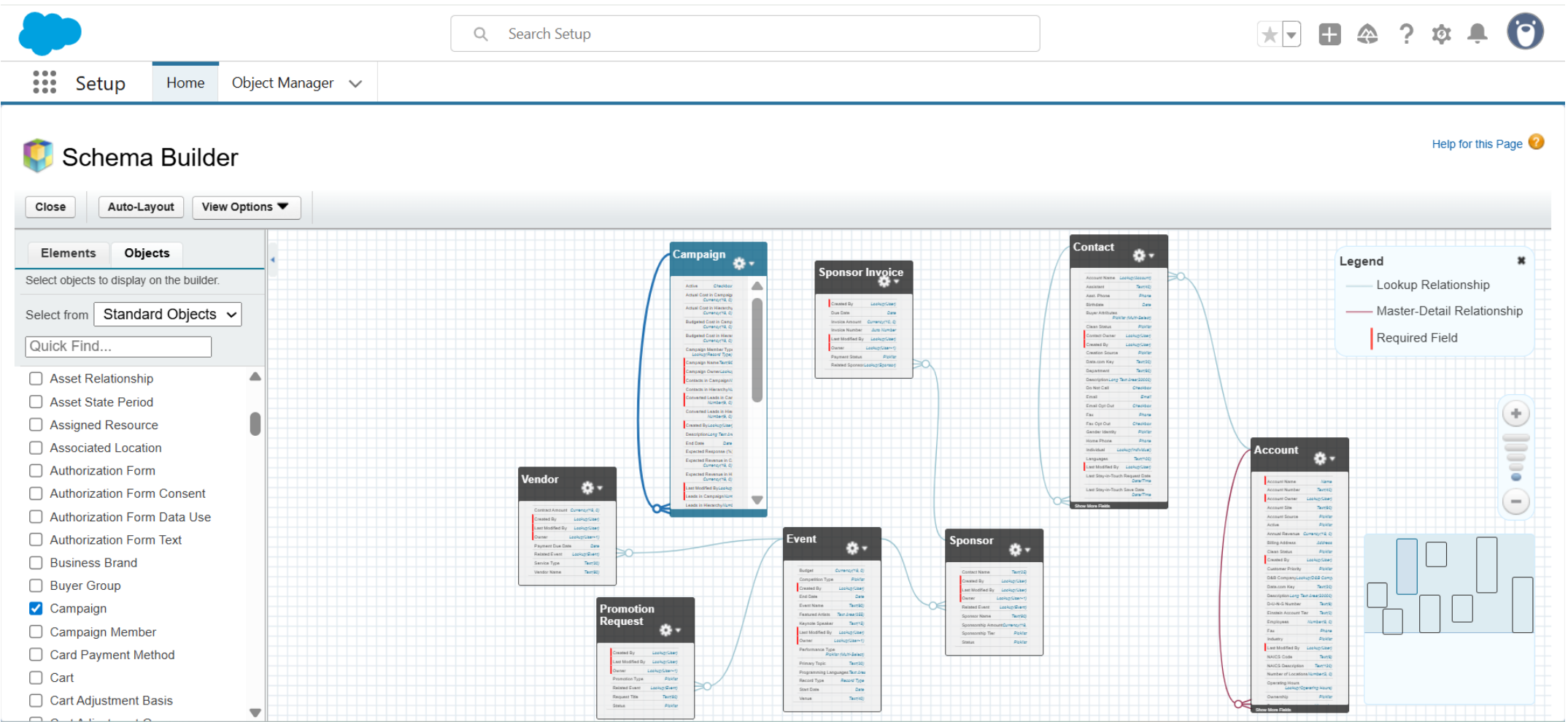
Junction Objects

- **Explanation:** A junction object is a custom object with two master-detail relationships that is used to create a **many-to-many relationship** between two other objects. In this project, the Sponsorship Contribution object solves the problem of a single sponsor being able to contribute to many events, and a single event having many sponsors. It acts as a bridge to track the specific details of each contribution.
- **Salesforce Path:** Setup → Quick Find → Object Manager → Create → Custom Object
- **Procedure & Configuration:**
  1. **Object Creation:** The Sponsorship Contribution custom object was created. The **Record Name** was configured as an **Auto-Number** with a display format like SC-{0000} to ensure a unique identifier for each contribution.
  2. **Master-Detail Relationships:**
     - A **Master-Detail Relationship** field was created on the Sponsorship Contribution object, linking it to the Event object.
     - A second **Master-Detail Relationship** field was created on the Sponsorship Contribution object, linking it to the Sponsor object.
  3. **Custom Fields:** Fields were created on the Sponsorship Contribution object to store specific data for each contribution:
     - Contribution Amount (Currency)

- Contribution Type (Text)
    4. **Page Layouts & Related Lists:** The **Sponsorship Contributions** related list was added to both the Event and Sponsor object page layouts.
- **Final Configuration:** The Sponsorship Contribution object now sits between the Event and Sponsor objects, creating a robust and accurate data model. Users can now view all contributions from a single event record or from a single sponsor record.

External Objects:

- **Explanation:** These are used to access data from an external system without storing it in Salesforce.
- **Procedure:** As all data will be managed within the Salesforce org, it is not required.