

# PHASE 3 – Data Modeling & Relationships (Online Appointment Booking for Legal Services in INDIA)

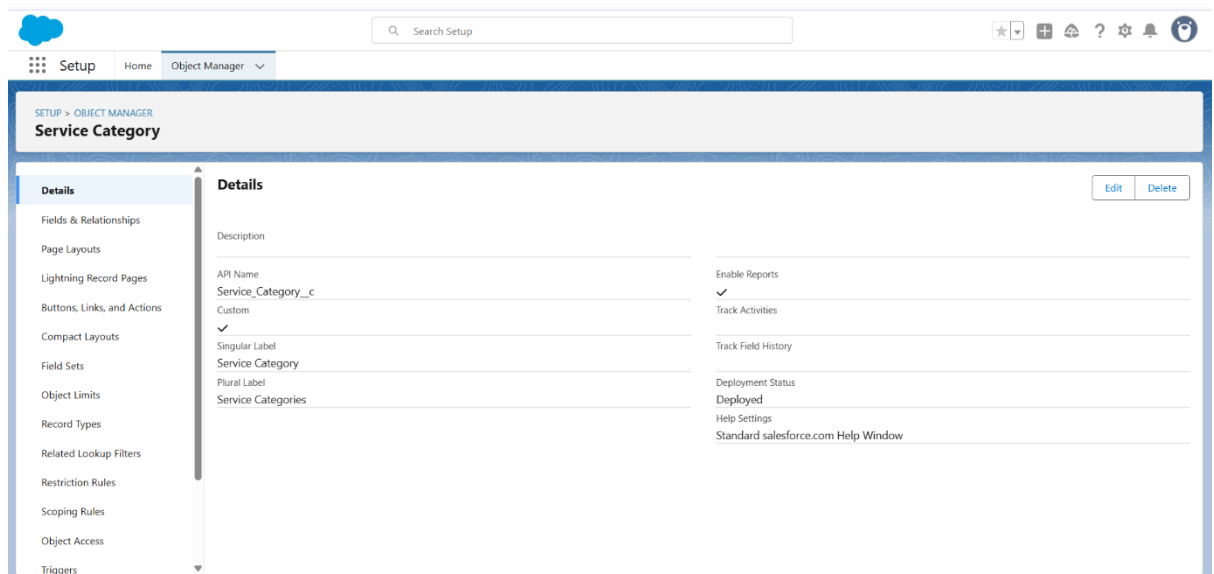
## Standard & Custom Objects

- **Standard Objects:**
  - **Contact:** Stores client information (name, email, phone).
  - **User:** Represents internal users such as lawyers and admins.
- **Custom Objects:**
  - **Service\_Category\_\_c** – Stores legal service types (e.g., Family Law, Criminal Law).
  - **Lawyer\_\_c** – Stores lawyer profiles with details like experience, location, cost.
  - **Appointment\_\_c** – Stores booking details (date, time, status).

## Fields

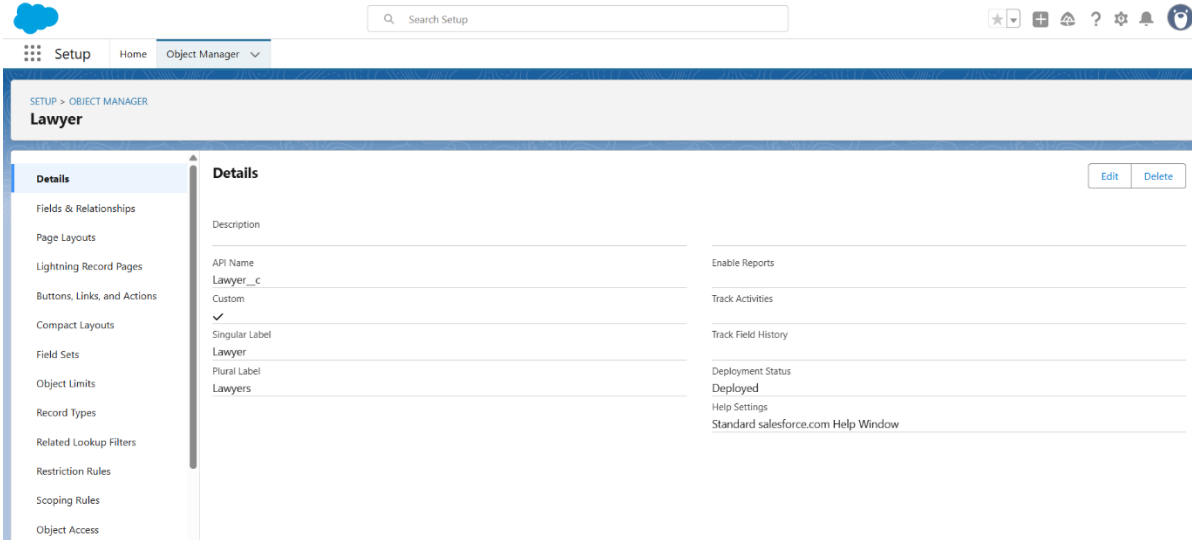
Each custom object requires specific fields:

- **Service\_Category\_\_c**
  - *Name* (Text – default).



- **Lawyer\_\_c**
  - *Experience\_\_c* (Number).
  - *Location\_\_c* (Text).

- *Hourly\_Cost\_\_c* (Currency).
- *Service\_Category\_\_c* (Lookup to Service\_Category\_\_c).

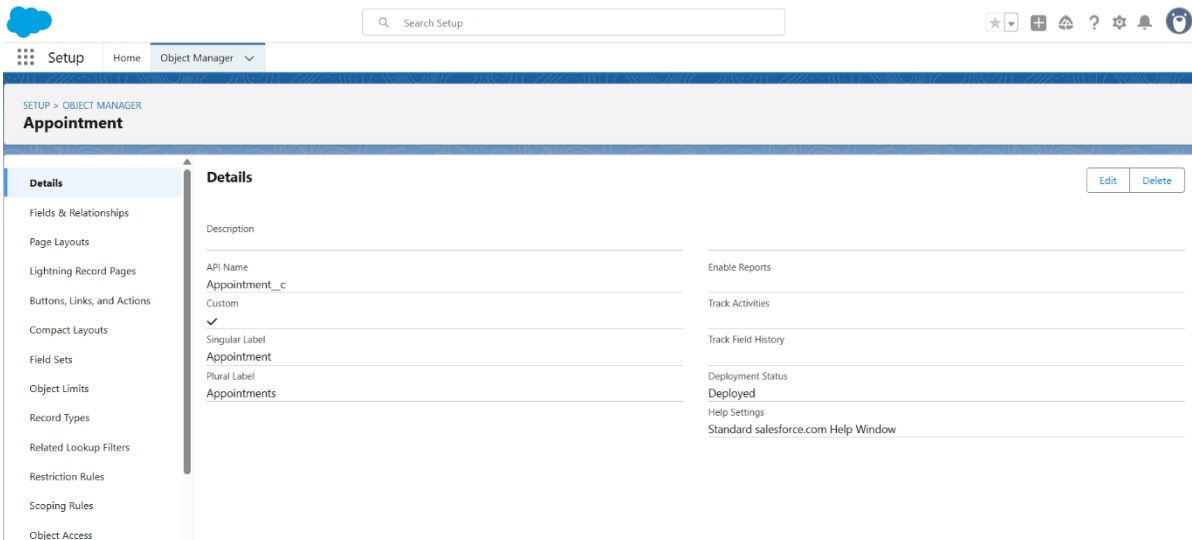


The screenshot shows the Salesforce Setup interface for the **Lawyer** object. The left sidebar contains a navigation menu with options like Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, Scoping Rules, and Object Access. The main content area is titled **Details** and includes fields for Description, API Name (Lawyer\_\_c), Custom (checked), Singular Label (Lawyer), Plural Label (Lawyers), Enable Reports, Track Activities, Track Field History, Deployment Status (Deployed), and Help Settings (Standard salesforce.com Help Window). Edit and Delete buttons are visible in the top right corner.

https://d9100000b7zx7uac-dev-ed.develop.lightning.force.com/one/app#/setup/ObjectManager/01kdl00000AF8np/view

## • Appointment\_\_c

- *Appointment\_Date\_\_c* (Date).
- *Appointment\_Time\_\_c* (Time).
- *Status\_\_c* (Picklist: Pending, Confirmed, Cancelled).
- *Lawyer\_\_c* (Lookup to Lawyer\_\_c).
- *Contact\_\_c* (Lookup to Contact).



The screenshot shows the Salesforce Setup interface for the **Appointment** object. The left sidebar contains a navigation menu with options like 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, Object Access, and Triggers. The main content area is titled **Details** and includes fields for Description, API Name (Appointment\_\_c), Custom (checked), Singular Label (Appointment), Plural Label (Appointments), Enable Reports, Track Activities, Track Field History, Deployment Status (Deployed), and Help Settings (Standard salesforce.com Help Window). Edit and Delete buttons are visible in the top right corner.

## Record Types

Define separate record types if appointment booking workflows differ:

- **Client Booking** – For external clients booking via the website.
- **Internal Booking** – For admin users booking on behalf of clients.

## Page Layouts

Configure layouts for each object:

- **Service Category Layout** – Simple, showing only the *Name*.
- **Lawyer Layout** – Display *Name*, *Experience*, *Location*, *Hourly Cost*, *Service Category*.
- **Appointment Layout** – Display *Client*, *Lawyer*, *Date*, *Time*, *Status*.

## Compact Layouts

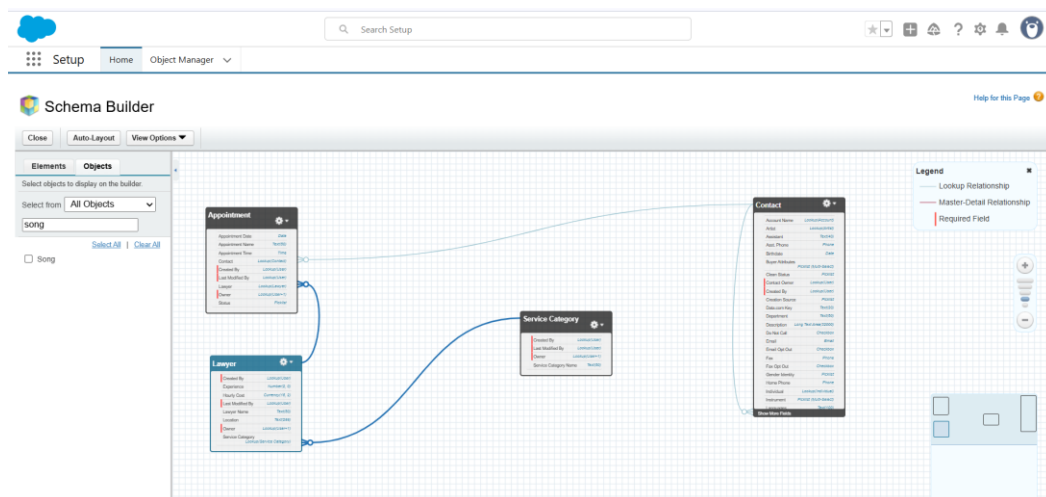
Compact layouts show key fields in mobile/Lightning highlights panel:

- **Lawyer\_\_c Compact Layout** – *Name*, *Location*, *Experience*, *Hourly Cost*.
- **Appointment\_\_c Compact Layout** – *Date*, *Time*, *Status*, *Lawyer*.

## Schema Builder

Use **Setup** → **Schema Builder** to visualize the data model:

- Ensure Service Category, Lawyer, and Appointment objects are properly connected.
- Verify relationships between Lawyer → Service Category (Lookup) and Appointment → Lawyer & Contact (Lookups).



## Lookup vs Master-Detail vs Hierarchical Relationships

- **Service Category → Lawyer:** *Lookup* (as a lawyer can belong to multiple categories if extended later).
- **Appointment → Lawyer & Contact:** *Lookup* (appointments exist even if a lawyer record is updated/deleted).
- **Hierarchical:** Not used here (only applicable on the User object).