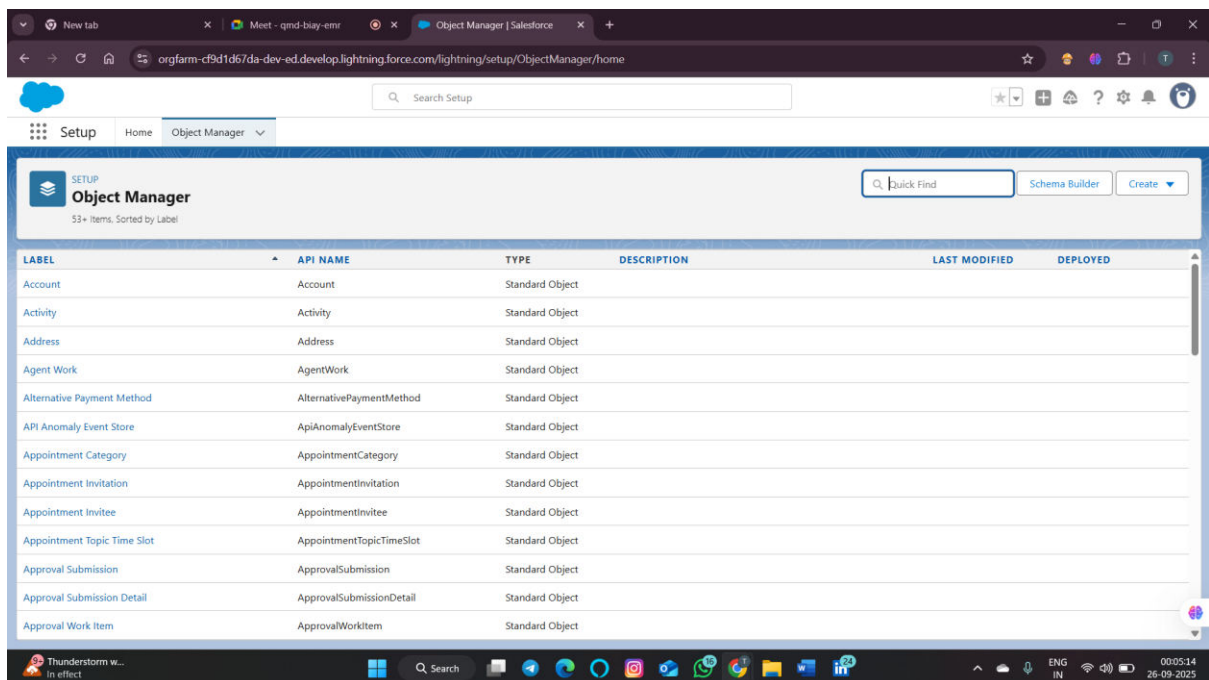


## Phase 3: Data Modeling & Relationships

### Standard & Custom Objects:

Healthcare uses standard objects like Contacts for patients and Accounts for hospitals, while custom objects manage appointments or medical records. Donation systems use Opportunities for donations, Contacts for donors, and custom objects for campaigns or events. Combining standard and custom objects supports specialized workflows.

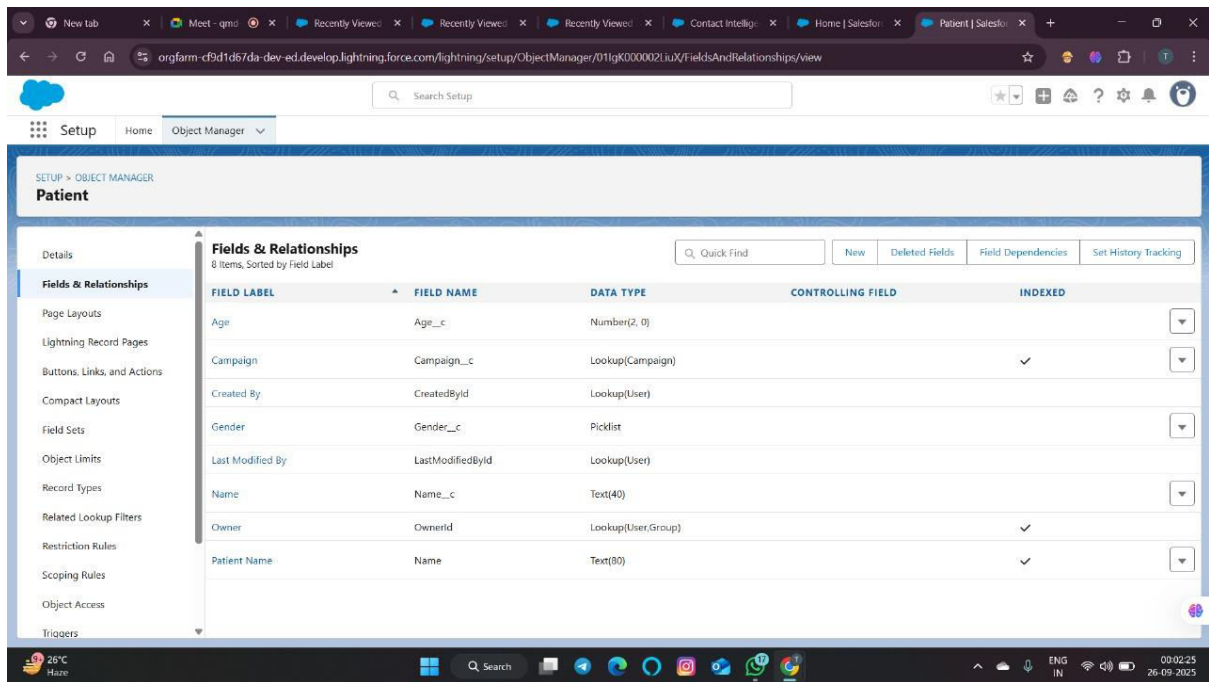


The screenshot displays the Salesforce Object Manager interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager' tabs. Below this, the 'Object Manager' section is titled '53+ Items, Sorted by Label'. A search bar labeled 'Quick Find' is present, along with 'Schema Builder' and 'Create' buttons. The main area contains a table with the following columns: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The table lists various standard objects, including Account, Activity, Address, Agent Work, Alternative Payment Method, API Anomaly Event Store, Appointment Category, Appointment Invitation, Appointment Invitee, Appointment Topic Time Slot, Approval Submission, Approval Submission Detail, and Approval Work Item.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Account	Account	Standard Object			
Activity	Activity	Standard Object			
Address	Address	Standard Object			
Agent Work	AgentWork	Standard Object			
Alternative Payment Method	AlternativePaymentMethod	Standard Object			
API Anomaly Event Store	ApiAnomalyEventStore	Standard Object			
Appointment Category	AppointmentCategory	Standard Object			
Appointment Invitation	AppointmentInvitation	Standard Object			
Appointment Invitee	AppointmentInvitee	Standard Object			
Appointment Topic Time Slot	AppointmentTopicTimeSlot	Standard Object			
Approval Submission	ApprovalSubmission	Standard Object			
Approval Submission Detail	ApprovalSubmissionDetail	Standard Object			
Approval Work Item	ApprovalWorkItem	Standard Object			

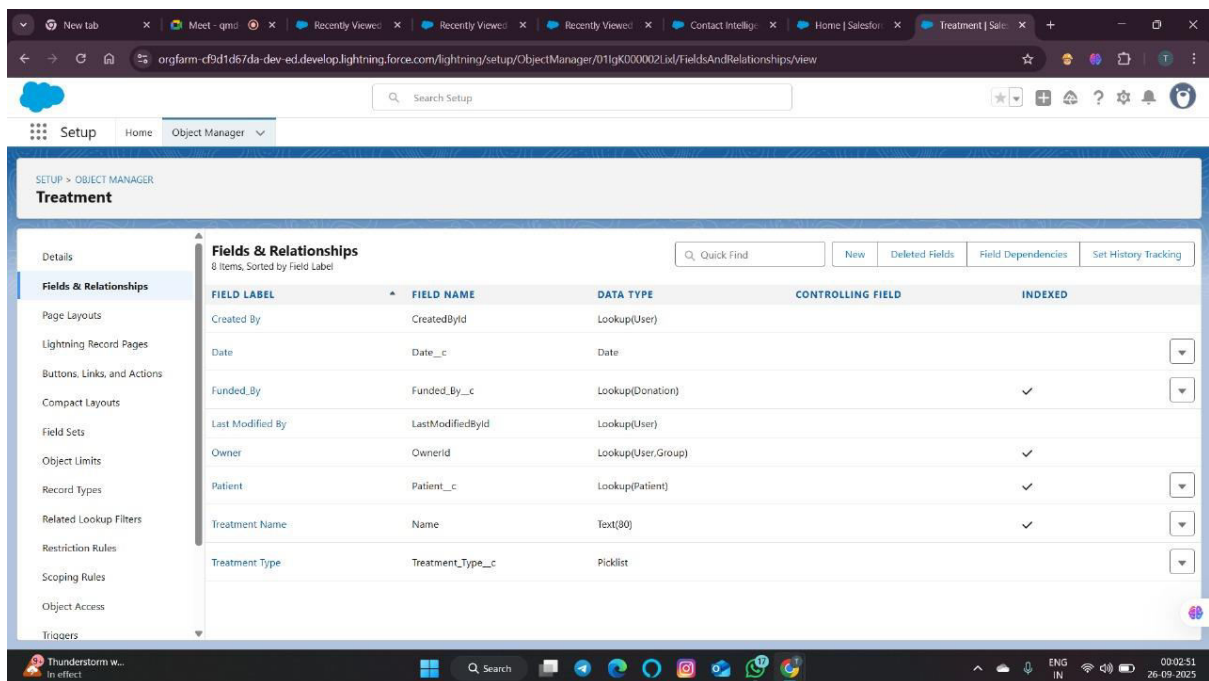
### Fields:

Healthcare systems need fields for patient details (age, medical history, allergies). Donation systems need fields for donor preferences, contribution frequency, and pledge amount. Custom fields capture project-specific data, while validation rules ensure accuracy and compliance. Fields structure critical information and support reports and automation.



## Record Types:

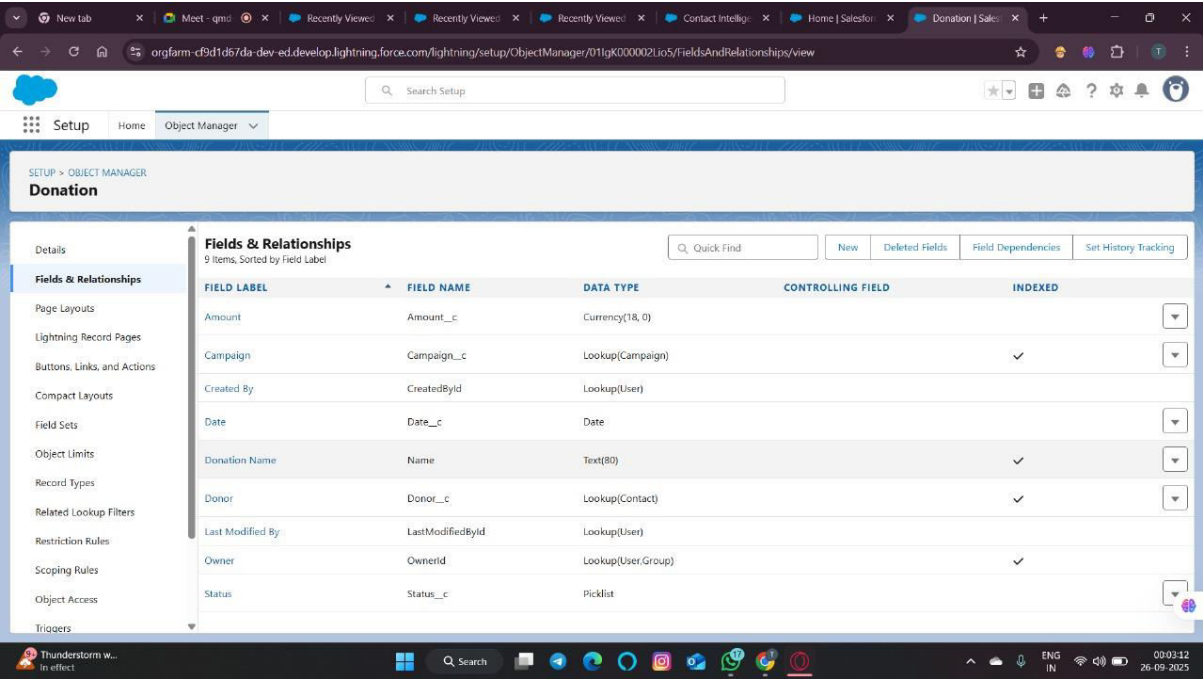
In healthcare, record types differentiate inpatient vs outpatient records or appointment types. In donation tracking, record types separate one-time donations from recurring pledges or corporate sponsorships. They allow customized processes, page layouts, and picklists to suit specific categories, improving usability and reporting.



## Page Layouts:

Healthcare page layouts display vital signs, treatment plans, and contact

information. Donation systems display donor history, pledge details, and related campaigns. Custom page layouts present role-based, relevant information to users, improving efficiency while ensuring sensitive or unnecessary details remain hidden.

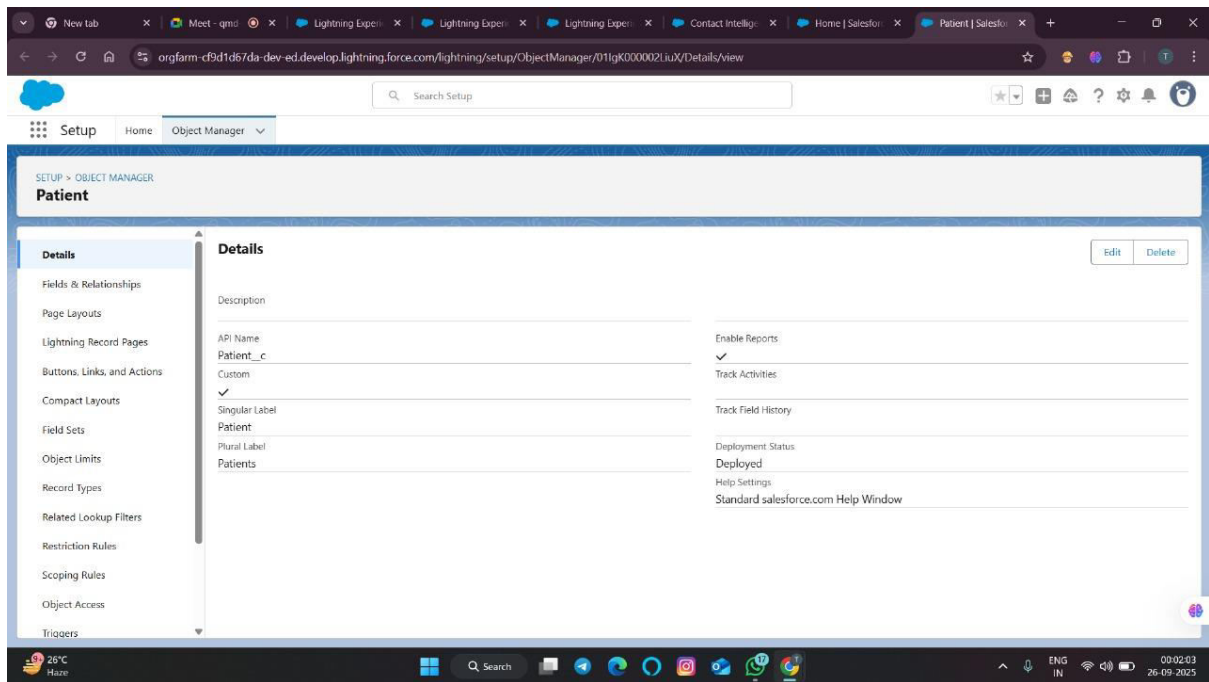


The screenshot shows the Salesforce Setup interface for the 'Donation' object. The 'Fields & Relationships' section is active, displaying a list of 9 fields sorted by Field Label. The fields are: Amount, Campaign, Created By, Date, Donation Name, Donor, Last Modified By, Owner, and Status. Each field entry includes its label, name, data type, controlling field, and indexed status. The interface includes a search bar, navigation tabs, and a sidebar with various setup options.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount_c	Currency(18, 0)		
Campaign	Campaign_c	Lookup(Campaign)		✓
Created By	CreatedById	Lookup(User)		
Date	Date_c	Date		
Donation Name	Name	Text(80)		✓
Donor	Donor_c	Lookup(Contact)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User Group)		✓
Status	Status_c	Picklist		

**Compact Layouts:**

Compact layouts in healthcare highlight patient name, age, and emergency contact on mobile or quick views. In donation systems, donor name, pledged amount, and donation status appear at the top. Compact layouts deliver essential information at a glance, enhancing productivity and mobile usability.



## Schema Builder:

Healthcare projects use Schema Builder to visualize patient, doctor, and treatment relationships. Donation systems map donors, donations, campaigns, and volunteers. Schema Builder provides a drag-and-drop interface to design, understand, and maintain data models, making relationships and dependencies easy to manage.

## Lookup vs Master-Detail vs Hierarchical Relationships:

Healthcare uses lookup for patient–insurance links, master-detail for prescription–medication records, and hierarchical for internal staff management. Donation systems use lookup for donor–event relations, master-detail for campaign–donation management, and hierarchical for organizing fundraiser teams. Choosing the right relationship ensures proper dependency and reporting.

Recently Viewed | Campaigns | x Recently Viewed | Treatments | x Recently Viewed | Treatments | x Contact Intelligence View | Cor x Donation | Salesforce x +

orgfarm-cf9d1d57da-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/011gK000002Lio5/Details/view

Setup Home Object Manager

SETUP > OBJECT MANAGER  
**Donation**

**Details** Edit Delete

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  
Triggers

**Details**

Description

API Name  
Donation\_\_c

Custom  
✓

Singular Label  
Donation

Plural Label  
Donations

Enable Reports  
✓

Track Activities

Track Field History

Deployment Status  
Deployed

Help Settings  
Standard salesforce.com Help Window

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Recently Viewed | Campaigns | x Recently Viewed | Treatments | x Recently Viewed | Treatments | x Contact Intelligence View | Cor x Treatment | Salesforce x +

orgfarm-cf9d1d57da-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/011gK000002Lio5/Details/view

Setup Home Object Manager

SETUP > OBJECT MANAGER  
**Treatment**

**Details** Edit Delete

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  
Triggers

**Details**

Description

API Name  
Treatment\_\_c

Custom  
✓

Singular Label  
Treatment

Plural Label  
Treatments

Enable Reports  
✓

Track Activities

Track Field History

Deployment Status  
Deployed

Help Settings  
Standard salesforce.com Help Window

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