**Phase 3 – Data Modeling & Relationships**

**Goal:** Build data structure in Salesforce for Subscriptions.

### 1. Objects Created

**Standard Object:** - Contact (Subscriber)

**Custom Objects:** - Subscription\_\_c - Plan\_\_c - Payment\_\_c - Refund\_\_c

### 2. Fields

Subscription\_\_c:- Subscription Number (Auto Number) - Contact\_\_c (Lookup to Contact) - Plan\_\_c (Lookup to Plan) - Start Date (Date) - End Date (Date) - Status (Picklist: Active, Cancelled, Paused, Expired) - Auto-Renew\_\_c (Checkbox) - Owner / Created By / Last Modified By (Standard)

Plan\_\_c:- Plan Number (Auto Number) - Name (Text) - Price\_\_c (Currency, INR) - Duration\_\_c (Picklist: Monthly, Quarterly, Yearly) - Description\_\_c (Rich Text) - Owner / Created By / Last Modified By (Standard)

Payment\_\_c:- Payment Number (Auto Number) - Amount (Currency, INR) - Date (Date/Time) - Status (Picklist: Success, Failed, Pending, Refunded) - Subscription\_\_c (Master-Detail to Subscription\_\_c) - Payment Authorization / Gateway / Method (Lookups, optional) - Total Refund Applied / Total Refund Unapplied (Roll-Up Summary) - Owner / Created By / Last Modified By (Standard)

Refund\_\_c: - Refund Number (Auto Number) - Amount (Currency, INR) - Date (Date/Time) - Status (Picklist: Processed, Pending) - Payment\_\_c (Master-Detail to Payment\_\_c) - Subscription\_\_c (Lookup to Subscription\_\_c, optional) - Comments / Gateway / IP / MAC / Audit (Optional)

### 3. Record Types

Plan\_\_c Record Types: - Monthly Plan - Yearly Plan - Duration picklist values assigned according to record type.

### 4. Page Layouts

Subscription\_\_c Layout: - Includes related lists: - Payments - Refunds - Fields displayed: Contact, Plan, Status, Start Date, End Date, Auto-Renew.

### 5. Compact Layouts

**Subscription Compact Layout:** - Fields shown in highlight panel: - Contact (Subscriber) - Plan - Status - Assigned as Primary for all profiles.

### 6. Relationships

| Source Object | Field | Target Object | Type |
| --- | --- | --- | --- |
| Subscription\_\_c | Contact\_\_c | Contact | Lookup |
| Subscription\_\_c | Plan\_\_c | Plan\_\_c | Lookup |
| Payment\_\_c | Subscription\_\_c | Subscription\_\_c | Master-Detail |
| Refund\_\_c | Payment\_\_c | Payment\_\_c | Master-Detail |

* These relationships allow proper hierarchy and roll-up summaries.

### 7. Schema Builder

* All objects added to Schema Builder: Contact, Subscription\_\_c, Plan\_\_c, Payment\_\_c, Refund\_\_c.
* Relationships visually confirmed: Lookup and Master-Detail as per table above.
* Optional screenshot can be attached for submission.

**Phase 3 Complete:** All objects, fields, record types, page layouts, compact layouts, and relationships have been created and verified as per the requirements.