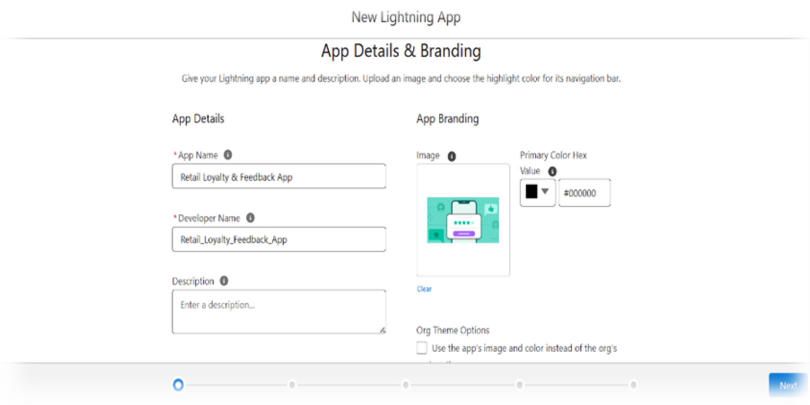
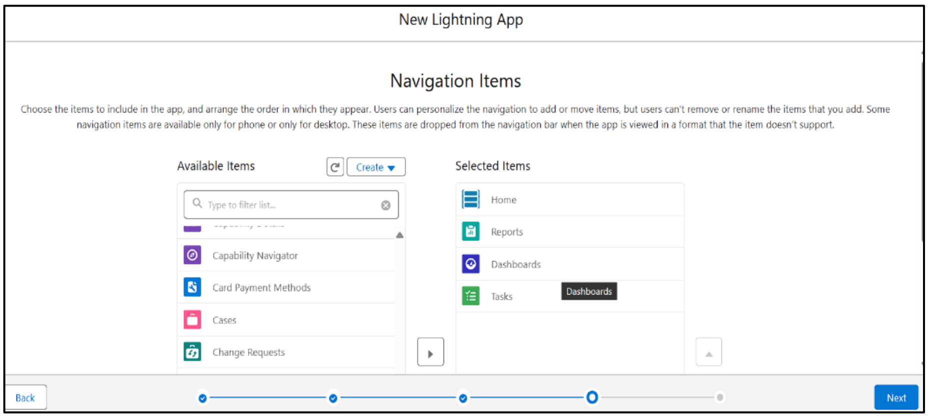
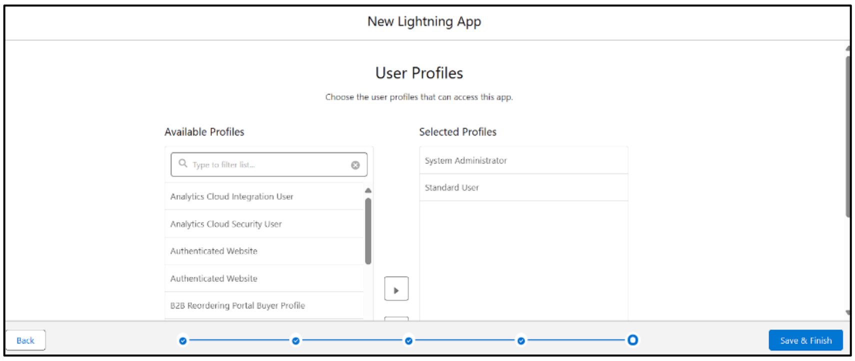
Phase 3: Data Modeling & Relationships



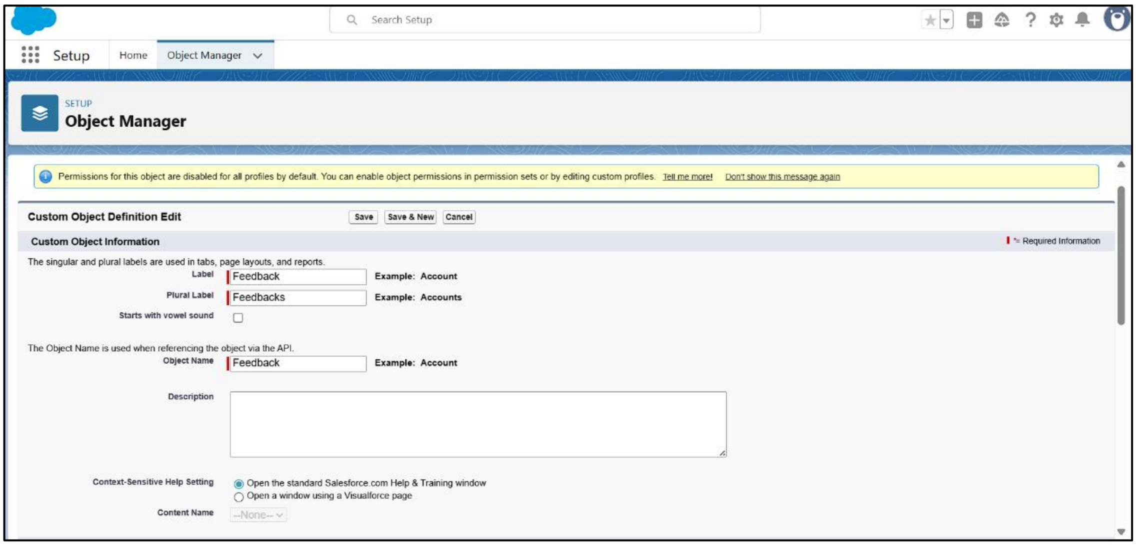
The screenshot shows the initial setup screen for creating a new Lightning App in Salesforce, titled "Retail Loyalty & Feedback App." The app name and developer name are filled in, while the description field is left blank. On the right, branding options are configured with a custom image and a primary color set to black (#000000). The user has chosen to override the default organizational theme by using the app's image and color. This setup helps personalize the app's appearance for end users. A progress bar at the bottom indicates that this is the first step in a multi-step creation process. The "Next" button allows the user to proceed to further configuration. This screen is essential for defining the app's identity and visual style.



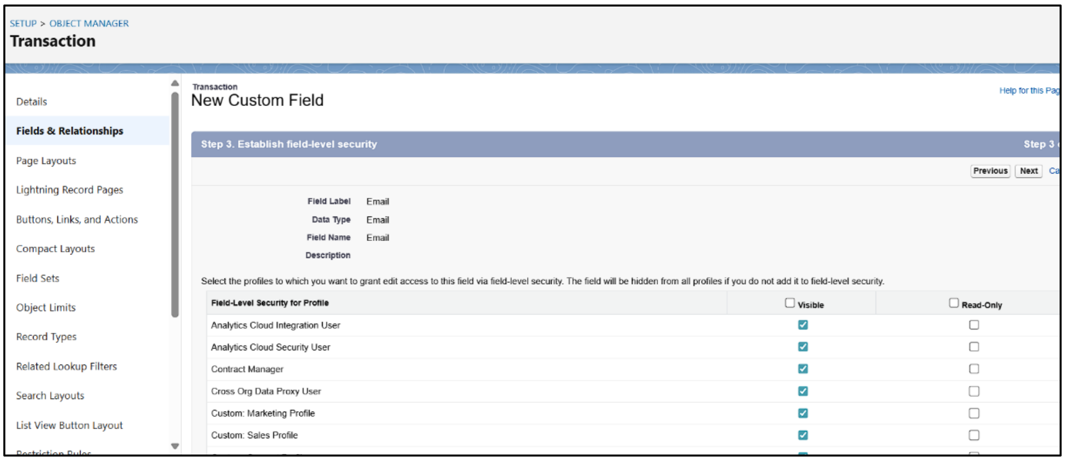
This screenshot shows the "Navigation Items" setup screen for a new Salesforce Lightning App. The interface is divided into two columns: "Available Items" on the left and "Selected Items" on the right. Items like Capability Navigator, Card Payment Methods, and Cases are available to add, while Home, Reports, Dashboards, and Tasks have already been selected for the app. These selected items will appear in the app's navigation bar for users. A "Create" dropdown allows quick access to additional components. The progress bar indicates this is step three of five in the setup process. The "Next" button at the bottom right moves the user to the next configuration step. This stage helps tailor the app's interface to user needs.



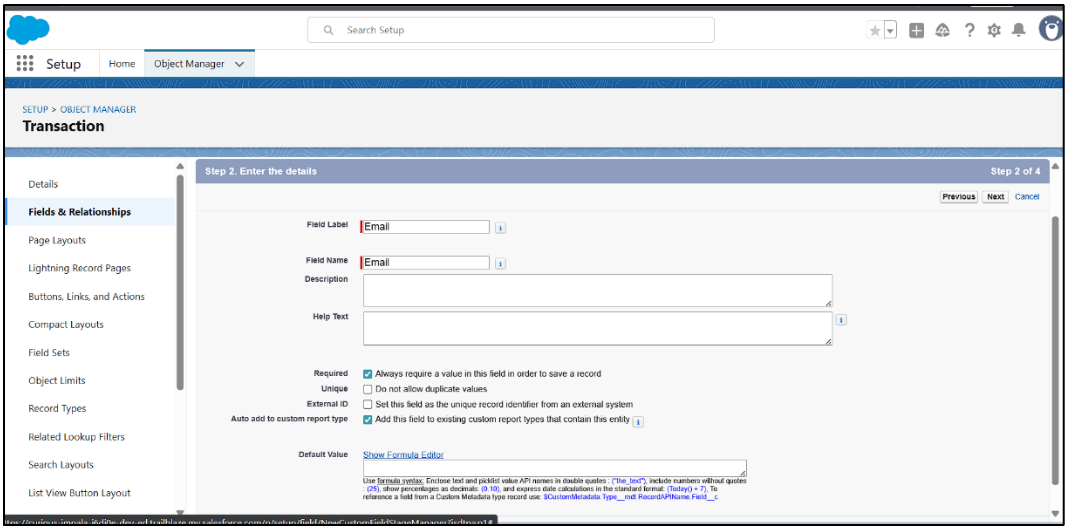
User Profiles Setup (Lightning App Builder):This screen shows the “User Profiles” step in the Lightning App creation process. On the left, a scrollable list of available profiles includes options like Analytics Cloud Integration User and B2B Reordering Portal Buyer Profile. On the right, the selected profiles—System Administrator and Standard User—are granted access to the app. This setup ensures that only authorized users can interact with the app. At the bottom, navigation buttons labeled “Back” and “Save & Finish” allow the user to finalize or revisit previous steps. The progress bar confirms this is one of the final steps in the app setup.



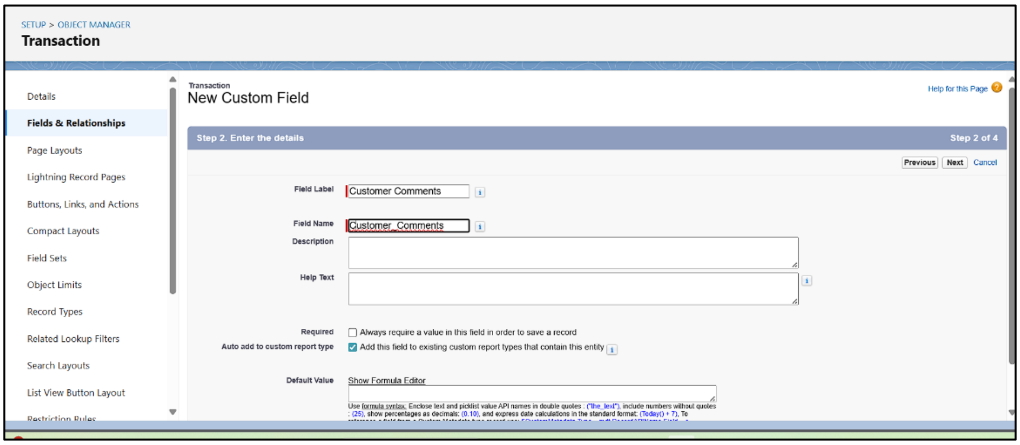
This screen is part of the Object Manager in Salesforce, where a custom object named “Feedback” is being defined. The object label, plural label, and record name are all set to “Feedback,” and the checkbox for “Starts with a vowel sound” is selected. A yellow notification warns that object permissions are disabled by default and must be manually enabled for profiles. The description field is empty, and help settings offer options between standard Salesforce help or a Visualforce page. This setup is foundational for capturing customer feedback within the CRM.



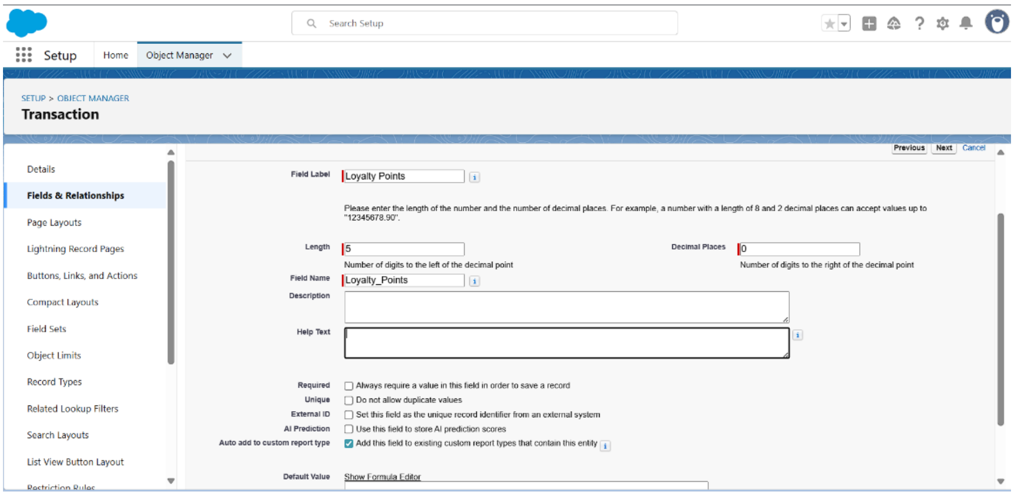
Field-Level Security – Email Field in Transaction Object: This screen shows step 3 of creating a new custom field called “Email” within the “Transaction” object. The field is of type Email, and the user is configuring field-level security for various profiles. A table lists profiles such as Contract Manager and Custom: Marketing Profile, with checkboxes to control visibility and read-only access. Most profiles have visibility enabled, while some are marked read-only. This step ensures that sensitive data like email addresses is properly secured and accessible only to relevant roles.



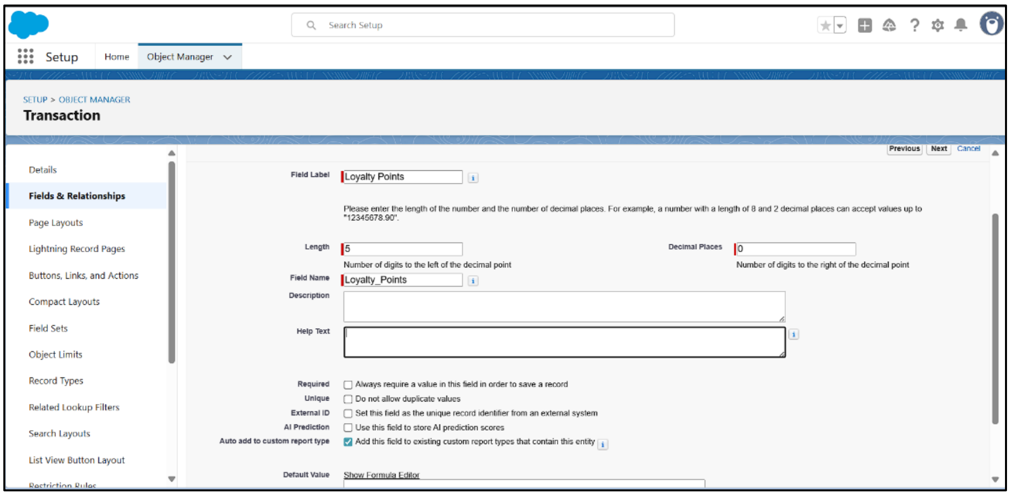
The **Email** field in the Transaction object is designed to dynamically populate the relevant contact address based on the type of transaction. If the transaction type is marked as "Purchase," it automatically pulls the buyer’s email from the Buyer_Email__c field. If it’s a "Sale," it retrieves the seller’s email from Seller_Email__c. For any other transaction type, the field remains blank. This setup ensures accurate and context-sensitive email assignment while maintaining data integrity. The field is marked as required, meaning a value must be present to save the record, and it also enforces uniqueness to prevent duplicate entries. This configuration supports streamlined communication and enhances reporting accuracy across transaction records.



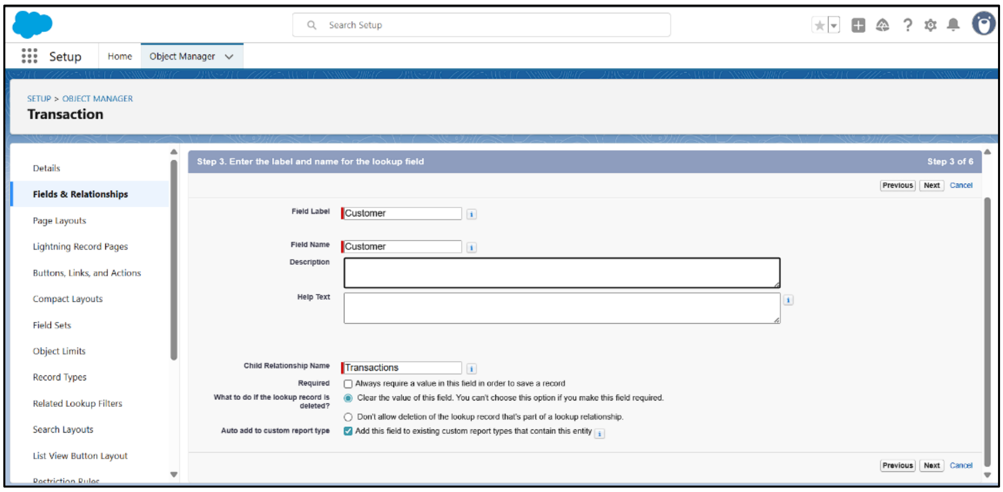
The **Customer Comments** field in the Transaction object is designed to capture free-form feedback or notes provided by customers during a transaction. This text field allows users to input qualitative details that may not be covered by structured data, such as special requests, concerns, or observations. It is optional, giving flexibility to users while still enabling valuable insights to be recorded. The field is added to the "Transaction Layout" to ensure visibility during record creation and editing. While it doesn't enforce any default value or validation, it plays a key role in enhancing customer service and internal communication. Field-level security can be configured to control access based on user profiles, ensuring sensitive feedback is only visible to relevant teams.



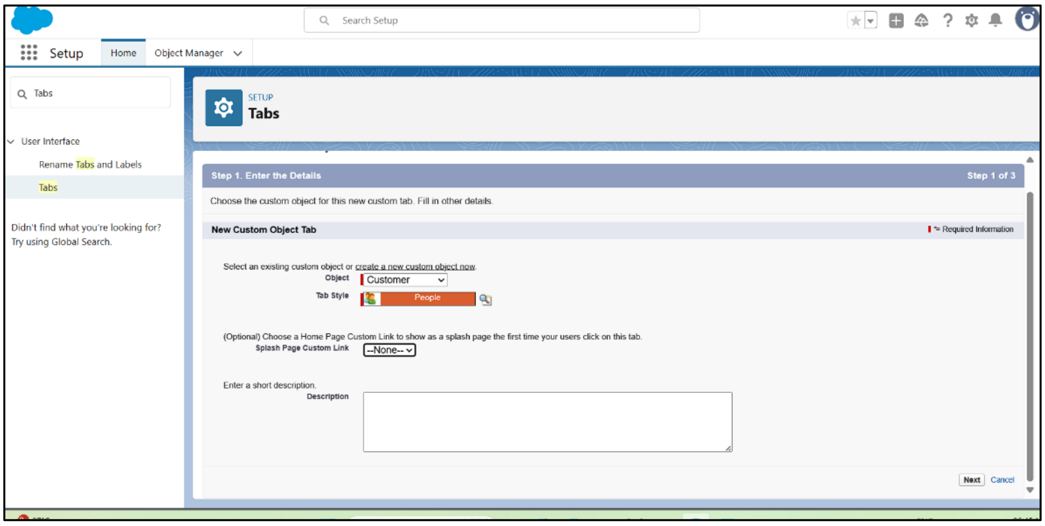
The Loyalty Points field in the Transaction object is a numeric field designed to track customer rewards earned or redeemed during each transaction. Configured to accept whole numbers up to eight digits, it supports loyalty program calculations without decimals. The field is optional and does not enforce uniqueness, allowing flexibility across multiple records. It is also included in custom report types, enabling visibility in dashboards and performance analytics. While no default value is set, the field can be used in formulas or automation to update points based on transaction value. This setup helps enhance customer engagement and supports reward-based marketing strategies. Field-level security and layout visibility can be tailored to suit different user roles.



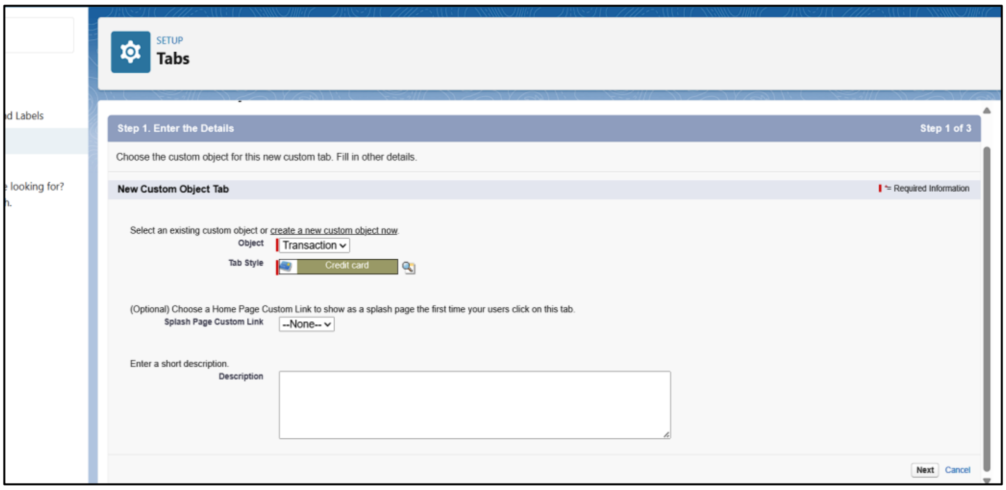
The **Loyalty Points** field in the Transaction object is a numeric field configured to store reward points associated with customer transactions. It allows up to eight digits with two decimal places, making it suitable for both whole and fractional point systems. This field helps track customer engagement and supports loyalty programs by recording earned or redeemed points. While it's not mandatory or unique, it is included in custom report types for visibility in analytics and dashboards. The field can be used in formulas or automation to calculate points based on transaction value or type. Its flexible setup ensures it can adapt to various business rules and promotional strategies.



The Customer field in the Transaction object is a lookup relationship that links each transaction to a specific customer record. This setup allows users to associate transactions with individual customers, enabling better tracking of purchase history and customer behavior. The field is not required, offering flexibility during data entry, and is configured to clear its value if the related customer record is deleted—preventing broken references. It also contributes to custom report types, making it easier to generate insights across customer interactions. The child relationship name is set to "Transactions," which helps in navigating related lists from the customer record. This field enhances data integrity and supports personalized service by connecting transactional data to customer profiles.



The **Customer** tab is a custom object tab created to provide users with direct access to customer records from the Salesforce navigation bar. It is linked to the "Customer" object and visually customized with an orange color and a selected icon for easy identification. This tab enhances usability by allowing users to quickly view, create, and manage customer data without navigating through multiple menus. While a splash page is not configured, the tab can be further personalized with links or instructions for first-time users. Adding this tab improves visibility and accessibility of customer-related information, supporting streamlined workflows and better user experience across teams.



The **Transaction** tab in Salesforce provides users with direct access to transaction records from the main navigation bar. It is linked to the custom Transaction object and visually styled with a credit card icon for easy identification. This tab simplifies workflows by allowing users to quickly view, create, and manage transaction data. Although no splash page is configured, it can be enhanced later for onboarding or guidance. The tab improves visibility and accessibility of transactional information across teams. It supports efficient operations and helps maintain organized data management within the CRM.