

Subscription / Personal Services Tracker CRM

Phase 3: Data Modeling & Relationships

OBJECTIVE:

To create custom objects and establish relationships between them to store and manage subscription-related data efficiently.

This phase includes:

- Creating Custom Objects
- Adding Custom Fields
- Setting Relationships (Lookup / Master-Detail)
- Setting Field-Level Security and Layouts
- Verifying relationships via related lists

Step 1: Create Custom Object: Subscription

Navigation:

Setup → Object Manager → Create → Custom Object

The screenshot shows the Salesforce 'New Custom Object' setup page. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager'. Below this, the page title is 'New Custom Object'. A yellow banner at the top of the main content area states: 'Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more!](#) [Don't show this message again](#)'. Below the banner, there's a 'Custom Object Definition Edit' section with 'Save', 'Save & New', and 'Cancel' buttons. The 'Custom Object Information' section includes fields for 'Label' (Subscription), 'Plural Label' (Subscriptions), 'Starts with vowel sound' (checkbox), 'Object Name' (Subscription__c), and 'Description'. Examples for 'Account' and 'Accounts' are provided for the label and plural label fields. At the bottom, there's a 'Context Sensitive Help Setting' section with two options: 'Open the standard Salesforce.com Help & Training window' (selected) and 'Open a window using a Visualforce page'. A 'Context Name' dropdown menu is also visible, currently set to 'None'.

Step 2: Add Custom Fields to Subscription Object

Navigation:

Object Manager → Subscription → Fields & Relationships → New

The screenshot shows the 'New Custom Field' wizard for the 'Subscription' object, specifically Step 4: 'Add to page layouts'. The left sidebar contains navigation links: Details, Fields & Relationships (selected), 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 'Subscription New Custom Field' and includes a 'Help for this Page' link. Below the title, there's a table with the following fields: Field Label, End Date, Data Type, Date, Field Name, End_Date, and Description, Subscription end date. A text box below the table states: 'Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout. To change the location of this field on the page, you will need to customize the page layout.' Below this, there are two checkboxes: 'Add Field' (checked) and 'Page Layout Name' (checked). The 'Page Layout Name' dropdown is set to 'Subscription Layout'. At the bottom, there are buttons for 'Previous', 'Save & New', 'Save', and 'Cancel'.

Step 3: Create Custom Object: Payment

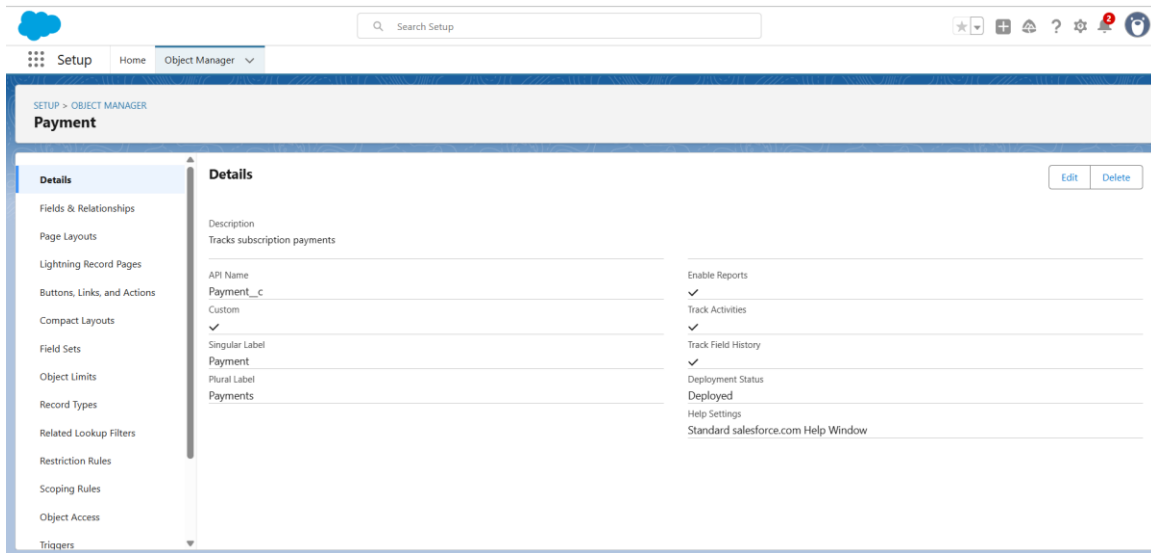
Navigation:

Setup → Object Manager → Create → Custom Object

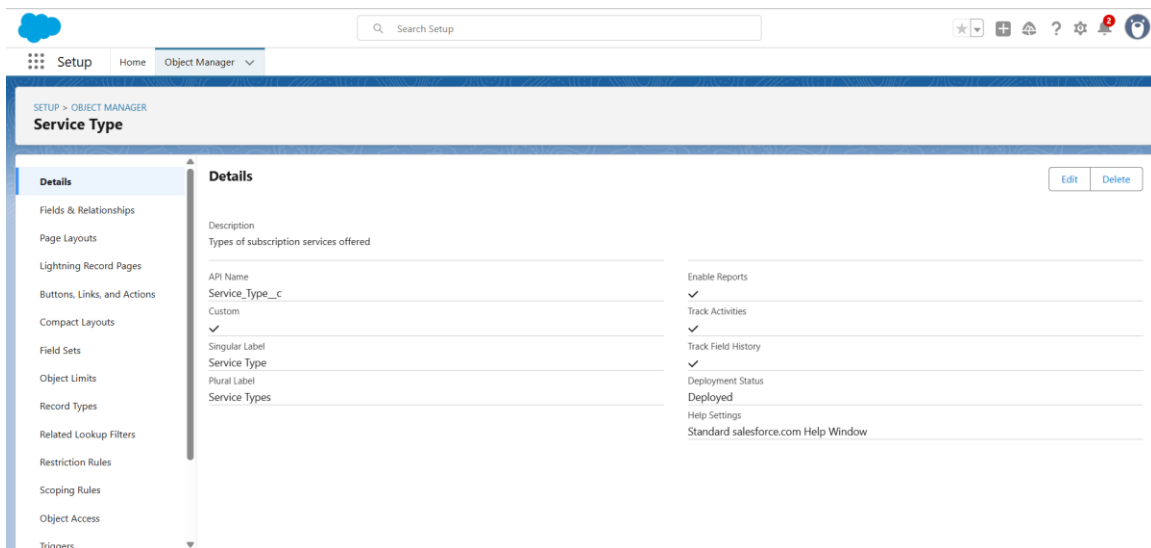
The screenshot shows the 'Fields & Relationships' page for the 'Subscription' object. The left sidebar contains navigation links: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, Scoping Rules, and Object Access. The main content area is titled 'Subscription Fields & Relationships' and includes a 'Quick Find' search bar and buttons for 'New', 'Deleted Fields', 'Field Dependencies', and 'Set History Tracking'. Below the title, there's a table with the following columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The table contains 9 items, sorted by Field Label.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount_c	Currency(18, 0)		
Contact	Contact_c	Lookup(Contact)		✓
Created By	CreatedById	Lookup(User)		
End Date	End_Date_c	Date		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Renewal Status	Renewal_Status_c	Picklist		
Start Date	Start_Date_c	Date		
Subscription Name	Name	Auto Number		✓

Step 4: Add Fields to Payment Object



Step 5: Create Custom Object: Service Type



Step 7: Set Up Relationships

- Subscription → Contact: Lookup Relationship
- Subscription → Service Type: Lookup Relationship
- Payment → Subscription: Master-Detail Relationship

Confirm Related Lists appear in:

- Contact → Subscriptions (related list)
- Subscription → Payments (related list)
- Service Type → Subscriptions

The screenshot shows the Salesforce Setup interface. The left sidebar contains a navigation menu with the following items: Actions & Recommendations, App Menu, Console Settings, Custom Labels, Density Settings, Global Actions, Lightning App Builder, Lightning Extension, Path Settings, Quick Text Settings, Record Page Settings, Rename Tabs and Labels, Sites and Domains, **Tabs** (highlighted), Themes and Branding, Translation Workbench, Export, Import, Override, and Translate. The main content area is titled 'Custom Tabs' and includes a 'Help for this Page' link. Below the title, there is a descriptive paragraph: 'You can create new custom tabs to extend Salesforce functionality or to build new application functionality. Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.' The 'Custom Object Tabs' section contains a table with the following data:

Action	Label	Tab Style	Description
Edit Del	Payments	Tab	
Edit Del	Service Types	Occurs	
Edit Del	Subscriptions	Ticket	

The 'Web Tabs', 'Visualforce Tabs', and 'Lightning Component Tabs' sections each show a 'New' button and a 'What is This?' link, but they all indicate that no tabs have been defined for those categories.