Phase 3: Data Modeling & Relationships
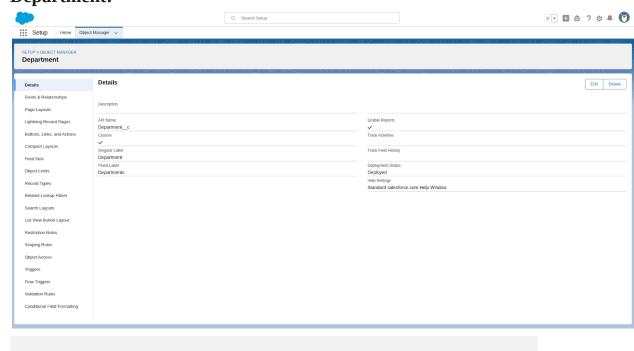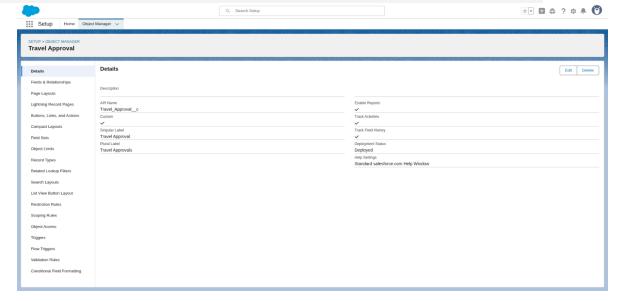
1. Standard & Custom Objects
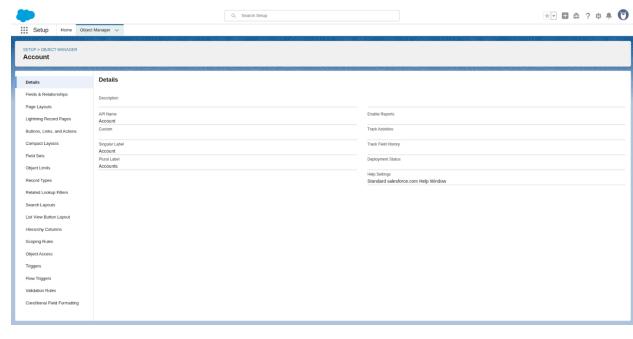
- **Department:**

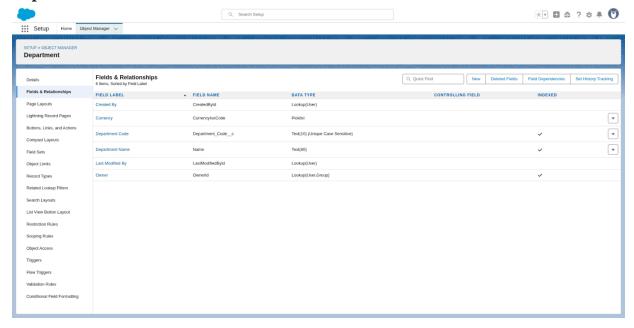- **Travel Approval:**
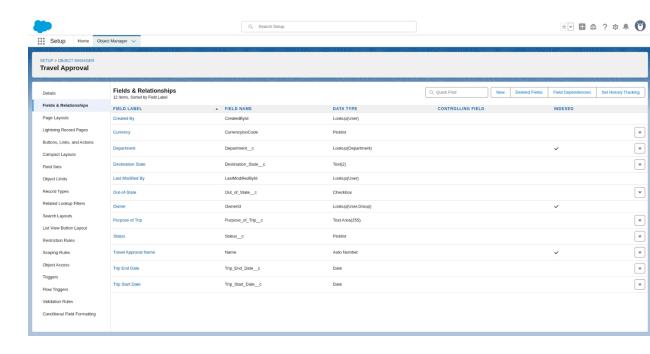
- ## Accounts:
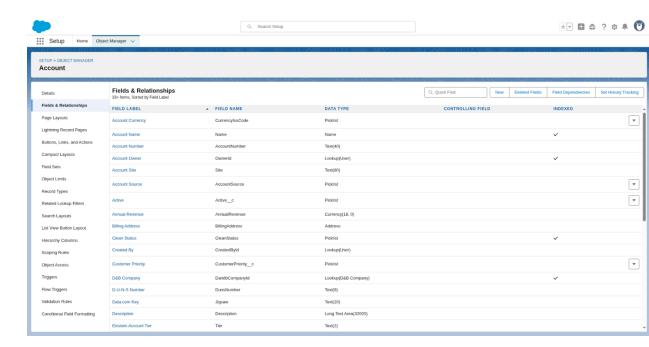

2. Fields

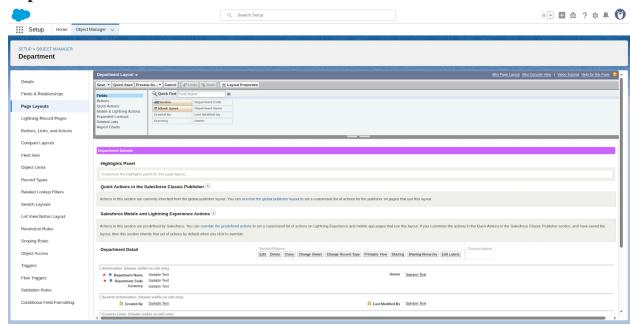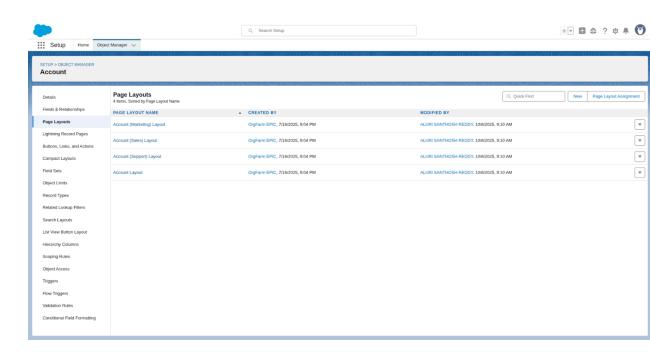- ## Department:

- **Travel Approval:**

- **Accounts:**

3. Record Types

4. Page Layouts

- **Department:**

- **Travel Approval:**

- **Accounts:**

Screenshot 1

Setup | Home | Object Manager

Search Setup

SETUP > OBJECT MANAGER
Account

Account Layout ▾

Mini Page Layout | Mini Console View | Video Tutorial | Help for this Page

Save ▾ | Quick Save | Preview As... ▾ | Cancel | Undo | Redo | Layout Properties

- Details
- Fields & Relationships
- **Page Layouts**
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Hierarchy Columns
- Scoping Rules
- Object Access
- Triggers
- Flow Triggers
- Validation Rules
- Conditional Field Formatting

Quick Find | Field Name

Fields
Buttons
Custom Links
Quick Actions
Mobile & Lightning Actions
Expanded Lookups
Related Lists

Section	Account Number	Active	Created By	Description	Fax	NAICS Code	Ownership	Region	SLA	Ticker Symbol	Website
Blank Space	Account Owner	Annual Revenue	Customer Priority	D-U-N-S Number	Has Support Plan	NAICS Description	Parent Account	Shipping Address	SLA Expiration Date	Tradestyle	Year Started
Account Currency	Account Site	Billing Address	D&B Company	Einstein Account ...	Industry	Number of Locations	Phone	SIC Code	SLA Serial Number	Type	Zone
Account Name	Account Source	Clean Status	Data.com Key	Employees	Last Modified By	Operating Hours	Rating	SIC Description	Support Plan Expi...	Upsell Opportunity

Account Sample

Highlights Panel

Customize the highlights panel for this page layout...

Quick Actions in the Salesforce Classic Publisher

Post | File | New Task | New Contact | New Case | Log a Call | New Note | New Opportunity | New Event | Link | Poll | Question | Email

Salesforce Mobile and Lightning Experience Actions

Post | File | New Task | New Contact | New Case | Log a Call | New Note | New Opportunity | New Event | Link | Poll | Question | Email | Change Owner | Include Offline
Check for New Data | Submit for Approval | Get Contacts | Edit | Delete | Change Record Type | Sharing | View Account Hierarchy | Call | Send Text | Email (mobile only) | View Website

Account Detail

Standard Buttons
Edit | Change Owner | Change Record Type | Send Survey | Delete | View Account Hierarchy | Sharing | Sharing Hierarchy | Include Offline | Get Survey Invitation | Check for New Data | View Partner Scorecard | Add to Call List | Printable View | Link a Slack Channel | New Partner Channel | Ad

Custom Buttons

Account Information (Header visible on edit only)

Account Owner — Sample Text
★ ● Account Name — Sample Text
● Parent Account — Sample Text
Account Number — Sample Text
Account Site — Sample Text

Rating — Sample Text
Phone — 1-415-555-1212
Fax — 1-415-555-1212
Website — www.salesforce.com
Ticker Symbol — Sample Text

Screenshot 2

Setup | Home | Object Manager

Search Setup

SETUP > OBJECT MANAGER
Account

Account (Marketing) Layout ▾

Mini Page Layout | Mini Console View | Video Tutorial | Help for this Page

Save ▾ | Quick Save | Preview As... ▾ | Cancel | Undo | Redo | Layout Properties

- Details
- Fields & Relationships
- **Page Layouts**
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Hierarchy Columns
- Scoping Rules
- Object Access
- Triggers
- Flow Triggers
- Validation Rules
- Conditional Field Formatting

Quick Find | Field Name

Fields
Buttons
Custom Links
Quick Actions
Mobile & Lightning Actions
Expanded Lookups
Related Lists

Section	Account Number	Active	Created By	Description	Fax	NAICS Code	Ownership	Region	SLA	Ticker Symbol	Website
Blank Space	Account Owner		Label: Account Number	D-U-N-S Number	Has Support Plan	NAICS Description	Parent Account	Shipping Address	SLA Expiration Date	Tradestyle	Year Started
Account Currency	Account Site		Type: Text / Length: 40	Einstein Account ...	Industry	Number of Locations	Phone	SIC Code	SLA Serial Number	Type	Zone
Account Name	Account Source		This item is currently in use (click to locate)	Employees	Last Modified By	Operating Hours	Rating	SIC Description	Support Plan Expi...	Upsell Opportunity

Account Sample

Highlights Panel

Customize the highlights panel for this page layout...

Quick Actions in the Salesforce Classic Publisher

Post | File | New Task | New Contact | New Case | Log a Call | New Note | New Opportunity | New Event | Link | Poll | Question | Email

Salesforce Mobile and Lightning Experience Actions

Post | File | New Task | New Contact | New Case | Log a Call | New Note | New Opportunity | New Event | Link | Poll | Question | Email | Include Offline | Edit
Change Owner | View Account Hierarchy | Submit for Approval | Get Contacts | Change Record Type | Check for New Data | Delete | Sharing | Call | Send Text | Email (mobile only) | View Website

Account Detail

Standard Buttons
Edit | Change Owner | Change Record Type | Send Survey | Delete | View Account Hierarchy | Sharing | Sharing Hierarchy | Include Offline | Get Survey Invitation | Check for New Data | View Partner Scorecard | Add to Call List | Printable View | Link a Slack Channel | New Partner Channel | Ad

Custom Buttons

Account Information (Header visible on edit only)

Account Owner — Sample Text
★ ● Account Name — Sample Text
● Parent Account — Sample Text
Account Number — Sample Text
Account Site — Sample Text

Rating — Sample Text
Phone — 1-415-555-1212
Fax — 1-415-555-1212
Website — www.salesforce.com
Ticker Symbol — Sample Text

Account (Sales) Layout

Mini Page Layout | Mini Console View | Video Tutorial | Help for this Page

Save ▾   Quick Save   Preview As... ▾   Cancel   Undo   Redo   Layout Properties

Quick Find Field Name

Section	Account Number	Active	Created By	Description	Fax	NAICS Code	Ownership	Region	SLA	Ticker Symbol	Website
Blank Space	Account Owner	Annual Revenue	Customer Priority	D-U-N-S Number	Has Support Plan	NAICS Description	Parent Account	Shipping Address	SLA Expiration Date	Tradestyle	Year Started
Account Currency	Account Site	Billing Address	D&B Company	Einstein Account ...	Industry	Number of Locations	Phone	SIC Code	SLA Serial Number	Type	Zone
Account Name	Account Source	Clean Status	Data.com Key	Employees	Last Modified By	Operating Hours	Rating	SIC Description	Support Plan Expi...	Upsell Opportunity	

Fields
Buttons
Custom Links
Quick Actions
Mobile & Lightning Actions
Expanded Lookups
Related Lists

Account Sample

Highlights Panel
Customize the highlights panel for this page layout.

Quick Actions in the Salesforce Classic Publisher
Post | File | New Task | New Contact | New Case | Log a Call | New Note | New Opportunity | New Event | Link | Poll | Question | Email

Salesforce Mobile and Lightning Experience Actions
Post | File | New Task | New Contact | New Case | Log a Call | New Note | New Opportunity | New Event | Link | Poll | Question | Email | Include Offline | Edit
Submit for Approval | Sharing | Change Record Type | Change Owner | Check for New Data | View Account Hierarchy | Get Contacts | Delete | Call | Send Text | Email (mobile only) | View Website

Account Detail
Standard Buttons
Edit | Change Owner | Change Record Type | Send Survey | Delete | View Account Hierarchy | Sharing | Sharing Hierarchy | Include Offline | Get Survey Invitation | Check for New Data | View Partner Scorecard | Add to Call List | Printable View | Link a Slack Channel | New Partner Channel | Ad...
Custom Buttons

Account Information (Header visible on edit only)

Account Owner	Sample Text	★ Active Sample Text
★ ● Account Name	Sample Text	Upsell Opportunity Sample Text
● Parent Account	Sample Text	Type Sample Text
Account Number	Sample Text	Rating Sample Text
Account Site	Sample Text	Phone 1-415-555-1212

Account (Support) Layout

Mini Page Layout | Mini Console View | Video Tutorial | Help for this Page

Save ▾   Quick Save   Preview As... ▾   Cancel   Undo   Redo   Layout Properties

Quick Find Field Name

Section	Account Number	Active	Created By	Description	Fax	NAICS Code	Ownership	Region	SLA	Ticker Symbol	Website
Blank Space	Account Owner	Annual Revenue	Customer Priority	D-U-N-S Number	Has Support Plan	NAICS Description	Parent Account	Shipping Address	SLA Expiration Date	Tradestyle	Year Started
Account Currency	Account Site	Billing Address	D&B Company	Einstein Account ...	Industry	Number of Locations	Phone	SIC Code	SLA Serial Number	Type	Zone
Account Name	Account Source	Clean Status	Data.com Key	Employees	Last Modified By	Operating Hours	Rating	SIC Description	Support Plan Expi...	Upsell Opportunity	

Fields
Buttons
Custom Links
Quick Actions
Mobile & Lightning Actions
Expanded Lookups
Related Lists

Account Sample

Highlights Panel
Customize the highlights panel for this page layout.

Quick Actions in the Salesforce Classic Publisher
Post | File | New Task | New Contact | New Case | Log a Call | New Note | New Opportunity | New Event | Link | Poll | Question | Email

Salesforce Mobile and Lightning Experience Actions
Post | File | New Task | New Contact | New Case | Log a Call | New Note | New Opportunity | New Event | Link | Poll | Question | Email | Get Contacts | Submit for Approval
View Account Hierarchy | Include Offline | Delete | Edit | Check for New Data | Sharing | Change Owner | Change Record Type | Call | Send Text | Email (mobile only) | View Website

Account Detail
Standard Buttons
Edit | Change Owner | Change Record Type | Send Survey | Delete | View Account Hierarchy | Sharing | Sharing Hierarchy | Include Offline | Get Survey Invitation | Check for New Data | View Partner Scorecard | Add to Call List | Printable View | Link a Slack Channel | New Partner Channel | Ad...
Custom Buttons

Account Information (Header visible on edit only)

Account Owner	Sample Text	Active Sample Text
★ ● Account Name	Sample Text	Customer Priority Sample Text
● Parent Account	Sample Text	SLA Sample Text
Account Number	Sample Text	SLA Expiration Date 10/8/2025
Account Site	Sample Text	SLA Serial Number Sample Text

Page Layouts navigation (left panel):
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Hierarchy Columns
Scoping Rules
Object Access
Triggers
Flow Triggers
Validation Rules
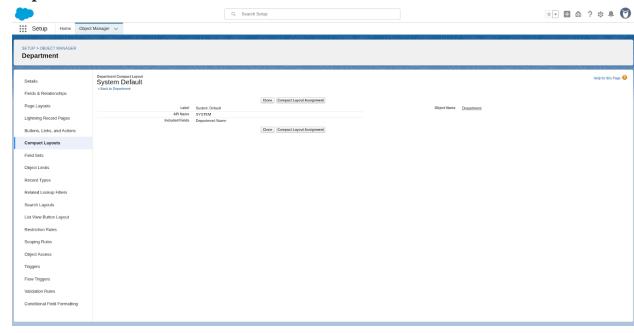Conditional Field Formatting
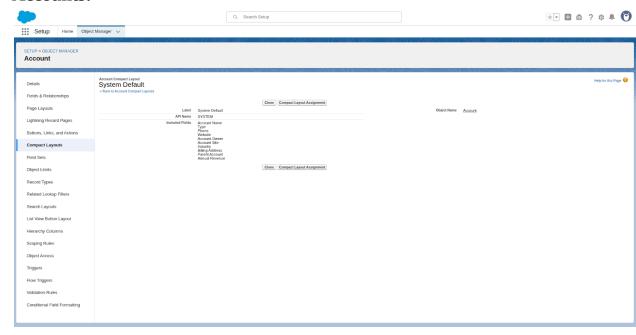
5. Compact Layouts
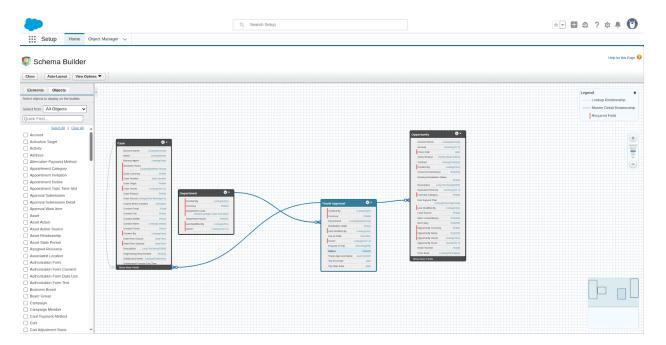
- ● **Department:**

- ● **Travel Approval:**

- **Accounts:**

6. Schema Builder

7. Lookup vs Master-Detail vs Hierarchical Relationships

Lookup Relationships: Link two objects where one doesn't strictly depend on the other (e.g., Tours and Tour Guides). Deleting the "parent" doesn't delete the "child."

Master-Detail Relationships: Create a strong, dependent link where the "detail" record cannot exist without the "master" (e.g., Bookings and Booking Line Items). Deleting the master deletes all associated details.

Hierarchical Relationships: A specialized lookup on a single object, linking records of the same type in a hierarchy (e.g., Employees and their Managers).

8. Junction Objects

Junction objects are essential in a Tourism Management Application for managing many-to-many relationships, such as connecting Tours with Destinations, Users/Travelers with Bookings, and Activities with Packages.

These objects enhance data integrity, reduce redundancy, and provide flexibility for representing and querying complex relationships within the tourism domain, allowing for additional specific attributes for each linked pair.

9. External Objects

No external objects used in this project.