

Phase 3: Data Modeling & Relationships

1. Standard & Custom Objects

- **Department:**

The screenshot shows the Salesforce Setup interface for the 'Department' object. The left sidebar contains a list of configuration options: 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, Restriction Rules, Scoping Rules, Object Access, Triggers, Flow Triggers, Validation Rules, and Conditional Field Formatting. The 'Details' section is selected, showing the following configuration:

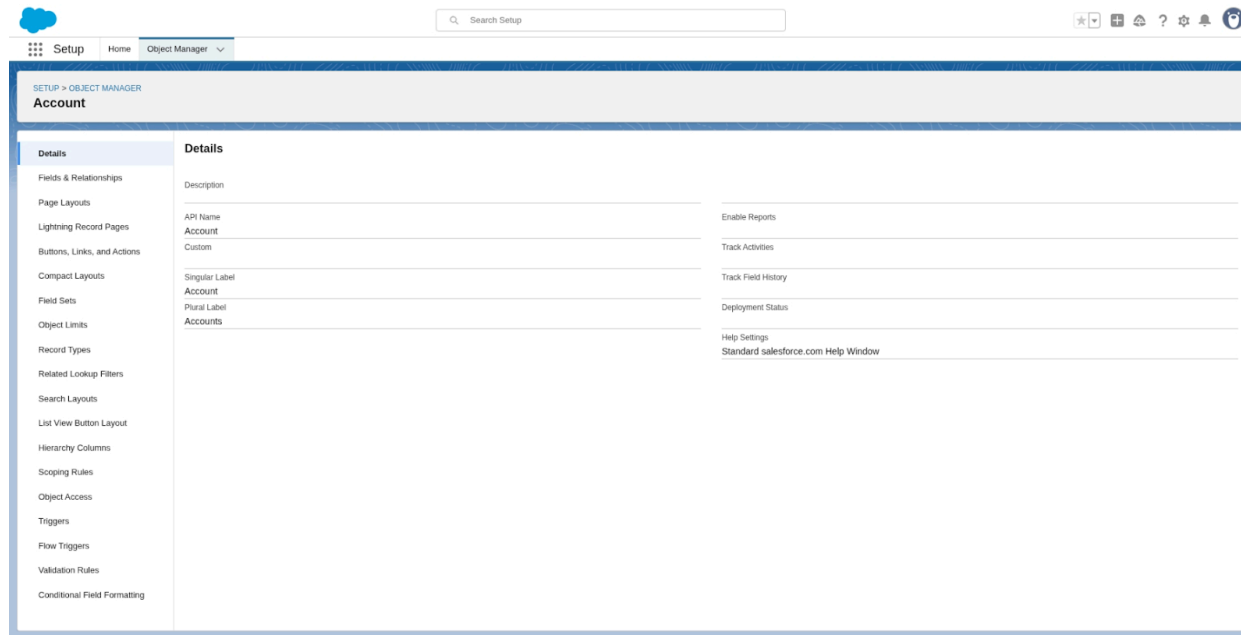
Field	Value
Description	
API Name	Department__c
Custom	<input checked="" type="checkbox"/>
Singular Label	Department
Plural Label	Departments
Enable Reports	<input checked="" type="checkbox"/>
Track Activities	<input checked="" type="checkbox"/>
Track Field History	<input checked="" type="checkbox"/>
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

- **Travel Approval:**

The screenshot shows the Salesforce Setup interface for the 'Travel Approval' object. The left sidebar contains a list of configuration options: 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, Restriction Rules, Scoping Rules, Object Access, Triggers, Flow Triggers, Validation Rules, and Conditional Field Formatting. The 'Details' section is selected, showing the following configuration:

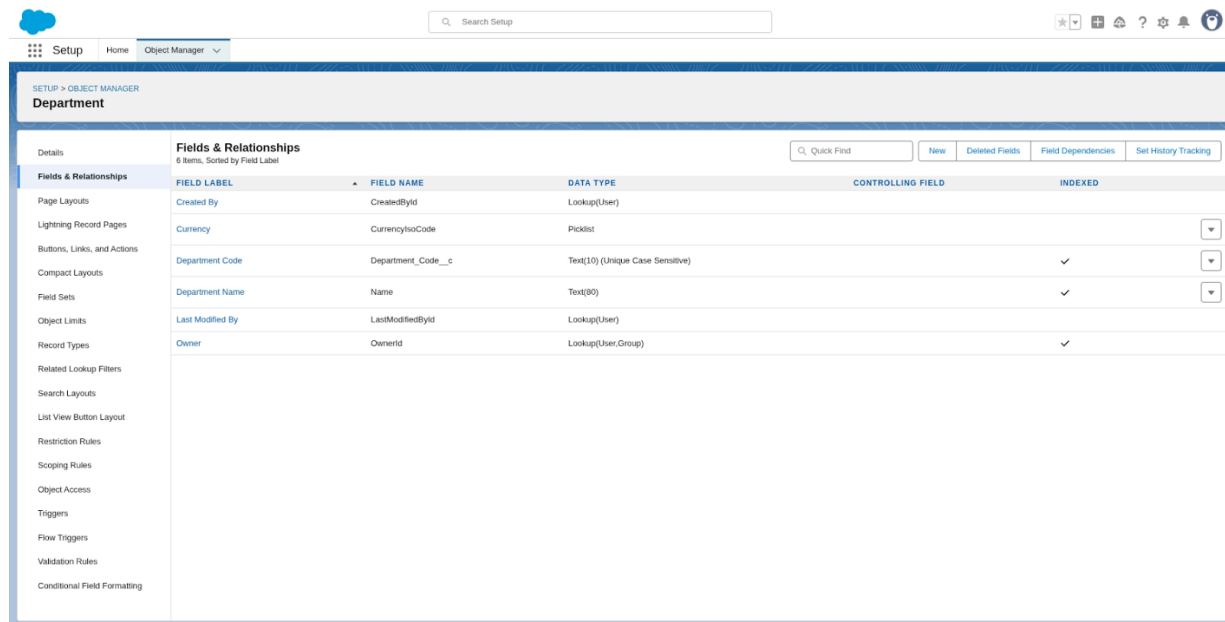
Field	Value
Description	
API Name	Travel_Approval__c
Custom	<input checked="" type="checkbox"/>
Singular Label	Travel Approval
Plural Label	Travel Approvals
Enable Reports	<input checked="" type="checkbox"/>
Track Activities	<input checked="" type="checkbox"/>
Track Field History	<input checked="" type="checkbox"/>
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

- Accounts:



2. Fields

- Department:



- **Travel Approval:**

Setup

Home

Object Manager

Q Search Setup

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SETUP > OBJECT MANAGER

Travel Approval

Details

Fields & Relationships

12 Items, Sorted by Field Label

Q Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Currency	CurrencyIsoCode	Picklist		
Department	Department__c	Lookup(Department)		✓
Destination State	Destination_State__c	Text(2)		
Last Modified By	LastModifiedById	Lookup(User)		
Out-of-State	Out_of_State__c	Checkbox		
Owner	OwnerId	Lookup(User.Group)		✓
Purpose of Trip	Purpose_of_Trip__c	Text Area(255)		
Status	Status__c	Picklist		
Travel Approval Name	Name	Auto Number		✓
Trip End Date	Trip_End_Date__c	Date		
Trip Start Date	Trip_Start_Date__c	Date		

- **Accounts:**

Setup

Home

Object Manager

Q Search Setup

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👤

SETUP > OBJECT MANAGER

Account

Details

Fields & Relationships

33+ Items, Sorted by Field Label

Q Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Account Currency	CurrencyIsoCode	Picklist		
Account Name	Name	Name		✓
Account Number	AccountNumber	Text(40)		
Account Owner	OwnerId	Lookup(User)		✓
Account Site	Site	Text(80)		
Account Source	AccountSource	Picklist		
Active	Active__c	Picklist		
Annual Revenue	AnnualRevenue	Currency(18, 0)		
Billing Address	BillingAddress	Address		
Clean Status	CleanStatus	Picklist		✓
Created By	CreatedById	Lookup(User)		
Customer Priority	CustomerPriority__c	Picklist		
D&B Company	DandbCompanyId	Lookup(D&B Company)		✓
D-U-N-S Number	DunsNumber	Text(9)		
Data.com Key	Jigsaw	Text(20)		
Description	Description	Long Text Area(32000)		
Einstein Account Tier	Tier	Text(2)		

3. Record Types

Tourism_Managem...

Search...

Star

Grid

Refresh

Help

Notifications

Profile

Dashboards

Accounts

Departments

Travel Approvals

Reports

Opportunities

Leads

Reports

Created by Me

5 items

Search reports created by me...

New Report

New Folder

Filter

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	cases		Tourism_Management	ALURI SANTHOSH REDDY	10/1/2025, 8:54 AM	
	Department		Tourism_Management	ALURI SANTHOSH REDDY	10/1/2025, 8:51 AM	
Created by Me	Travel Approvals Report		Tourism_Management	ALURI SANTHOSH REDDY	10/1/2025, 10:28 AM	
Private Reports	Travel Approvals with Department		Tourism_Management	ALURI SANTHOSH REDDY	10/1/2025, 10:32 AM	
Public Reports	Travel Expenses		Tourism_Management	ALURI SANTHOSH REDDY	10/1/2025, 10:34 AM	
All Reports						
FOLDERS						
All Folders						
Created by Me						
Shared with Me						
FAVORITES						
All Favorites						

4. Page Layouts

- Department:

Setup

Home

Object Manager

Search Setup

Star

Grid

Refresh

Help

Notifications

Profile

Setup > OBJECT MANAGER

Department

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

Restriction Rules

Scoping Rules

Object Access

Triggers

Flow Triggers

Validation Rules

Conditional Field Formatting

Department Layout

Save

Quick Save

Preview As...

Cancel

Undo

Redo

Layout Properties

Quick Find

Fields

Buttons

Quick Actions

Mobile & Lightning Actions

Expanded Lookups

Related Lists

Report Charts

Department Code

Department Name

Created By

Last Modified By

Currency

Owner

Department Sample

Highlights Panel

Customize the highlights panel for this page layout...

Quick Actions in the Salesforce Classic Publisher

Actions in this section are currently inherited from the global publisher layout. You can override the global publisher layout to set a customized list of actions for the publisher on pages that use this layout.

Salesforce Mobile and Lightning Experience Actions

Actions in this section are predefined by Salesforce. You can override the predefined actions to set a customized list of actions on Lightning Experience and mobile app pages that use this layout. If you customize the actions in the Quick Actions in the Salesforce Classic Publisher section, and have saved the layout, then this section inherits that set of actions by default when you click to override.

Department Detail

Standard Buttons

Edit

Delete

Clone

Change Owner

Change Record Type

Printable View

Sharing

Sharing Hierarchy

Edit Labels

Custom Buttons

Information (header visible on edit only)

Department Name

Sample Text

Owner

Sample Text

Department Code

Sample Text

Created By

Sample Text

System Information (header visible on edit only)

Created By

Sample Text

Last Modified By

Sample Text

Custom Links (header visible on edit only)

● Travel Approval:

The screenshot shows the Salesforce Setup interface for editing the 'Travel Approval' layout. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts (selected), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules, Object Access, Triggers, Flow Triggers, Validation Rules, and Conditional Field Formatting. The main content area is titled 'Travel Approval Layout' and includes a 'Save' button, a 'Quick Save' button, a 'Preview As...' button, and a 'Cancel' button. Below these are 'Undo' and 'Redo' buttons. The 'Layout Properties' section shows a table of fields with columns for Field Name, Department, Owner, Trip End Date, Destination State, Purpose of Trip, Trip Start Date, Created By, Last Modified By, Status, Currency, Out-of-State, and Travel Approval Name. The 'Travel Approval Sample' section includes a 'Highlights Panel' and 'Quick Actions in the Salesforce Classic Publisher'. The 'Travel Approval Detail' section shows a record with fields like Travel Approval Name, Purpose of Trip, Status, Trip Start Date, Trip End Date, Out-of-State, and Destination State. The record is owned by 'Sample Text'.

● Accounts:

The screenshot shows the Salesforce Setup interface for editing the 'Account' layout. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts (selected), 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, and Conditional Field Formatting. The main content area is titled 'Account' and includes a 'Page Layouts' section. This section shows a table of page layouts with columns for Page Layout Name, Created By, and Modified By. The table lists four page layouts: Account (Marketing) Layout, Account (Sales) Layout, Account (Support) Layout, and Account Layout. Each layout is created by 'OrgFarm EPIC' and modified by 'ALURI SANTHOSH REDDY' on 10/6/2025 at 9:10 AM. The table also includes a 'Quick Find' search bar and a 'New' button.

Setup

Home

Object Manager

Search Setup

Setup > OBJECT MANAGER

Account

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

Account (Sales) Layout

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

Fields

Quick Find

Field Name

Account Number

Account Owner

Annual Revenue

Customer Priority

D-M-S Number

Has Support Plan

NAICS Code

NAICS Description

Parent Account

Shipping Address

SLA Expiration Date

Tradestyle

Year Started

Account Currency

Account Site

Billing Address

D&S Company

Elstein 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 Exp...

Upwell 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 Pull 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 Pull 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 Initiation Check for New Data View Partner Scorecard Add to Call List Printable View Link a Slack Channel New Partner Channel

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

Active Sample Text

Upwell Opportunity Sample Text

Type Sample Text

Rating Sample Text

Phone 1-415-555-1212

Setup

Home

Object Manager

Search Setup

Setup > OBJECT MANAGER

Account

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

Account (Support) Layout

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

Fields

Quick Find

Field Name

Account Number

Account Owner

Annual Revenue

Customer Priority

D-M-S Number

Has Support Plan

NAICS Code

NAICS Description

Parent Account

Shipping Address

SLA Expiration Date

Tradestyle

Year Started

Account Currency

Account Site

Billing Address

D&S Company

Elstein 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 Exp...

Upwell 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 Pull 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 Pull 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 Initiation Check for New Data View Partner Scorecard Add to Call List Printable View Link a Slack Channel New Partner Channel

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

Active Sample Text

Customer Priority Sample Text

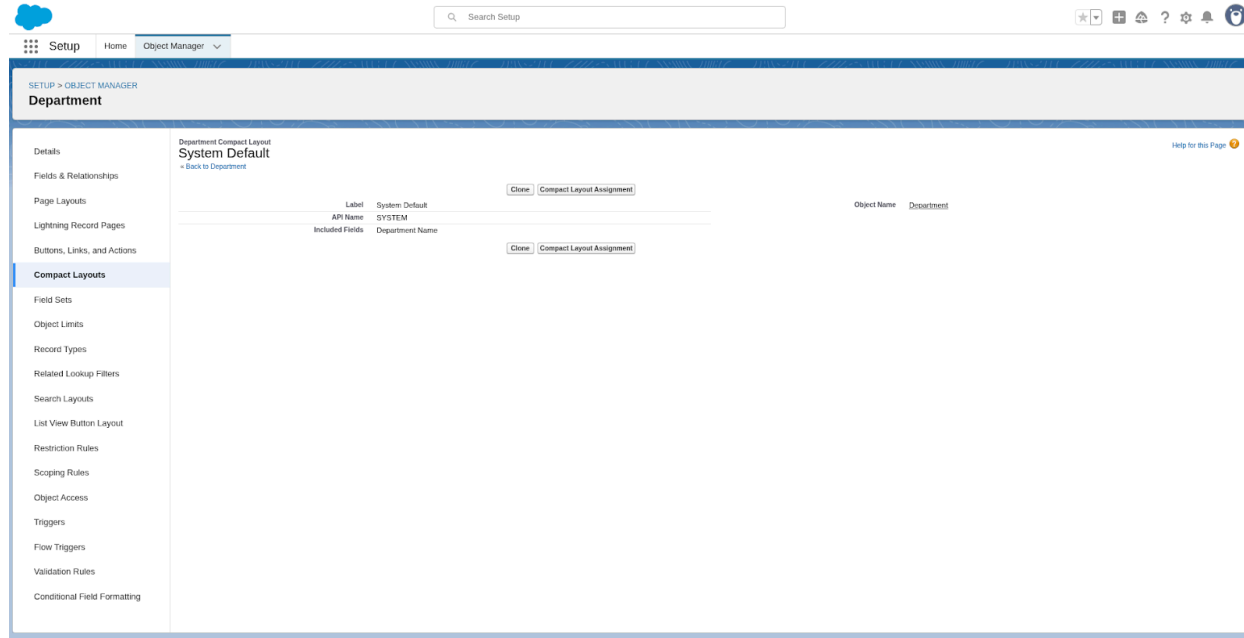
SLA Sample Text

SLA Expiration Date 10/9/2025

SLA Serial Number Sample Text

5. Compact Layouts

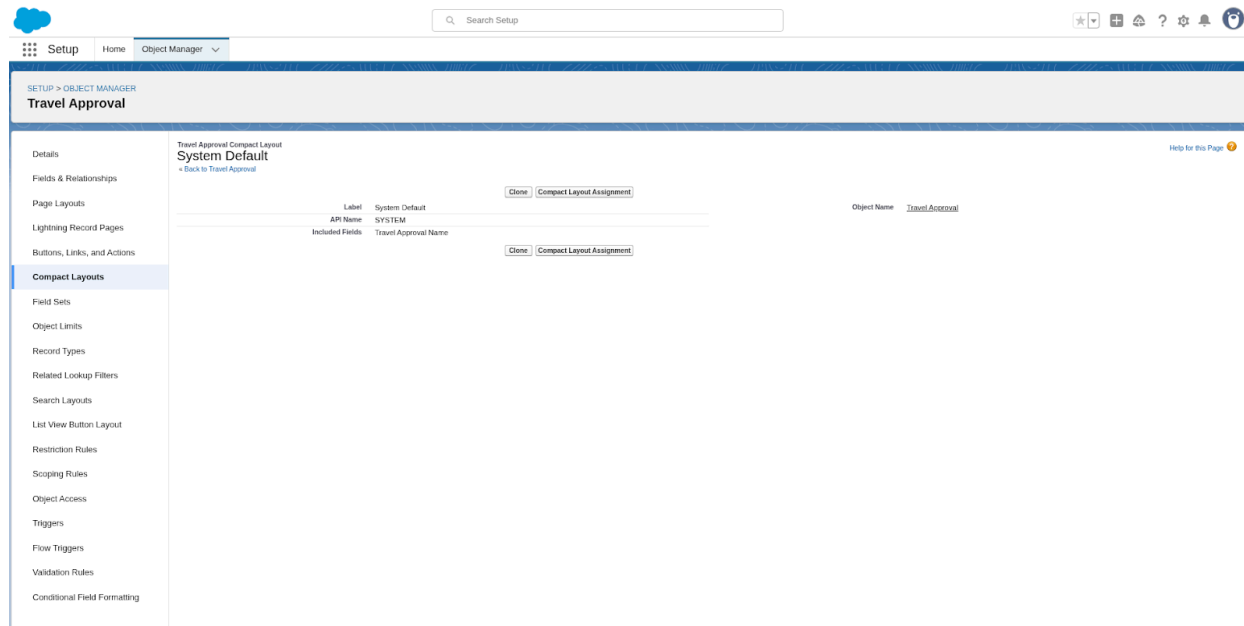
- **Department:**



The screenshot shows the Salesforce Setup interface for the 'Department' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, **Compact Layouts** (selected), Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules, Object Access, Triggers, Flow Triggers, Validation Rules, and Conditional Field Formatting. The main content area is titled 'Department Compact Layout System Default' with a link to 'Back to Department'. It displays a table with columns: Label, System Default, Object Name, and Department. The table has two rows, each with a 'Clone' button and a 'Compact Layout Assignment' button. The first row has 'API Name' as the label and 'SYSTEM' as the system default. The second row has 'Included Fields' as the label and 'Department Name' as the system default. The 'Object Name' column shows 'Department' and the 'Department' column is empty.

Label	System Default	Object Name	Department
API Name	SYSTEM	Department	
Included Fields	Department Name		

- **Travel Approval:**



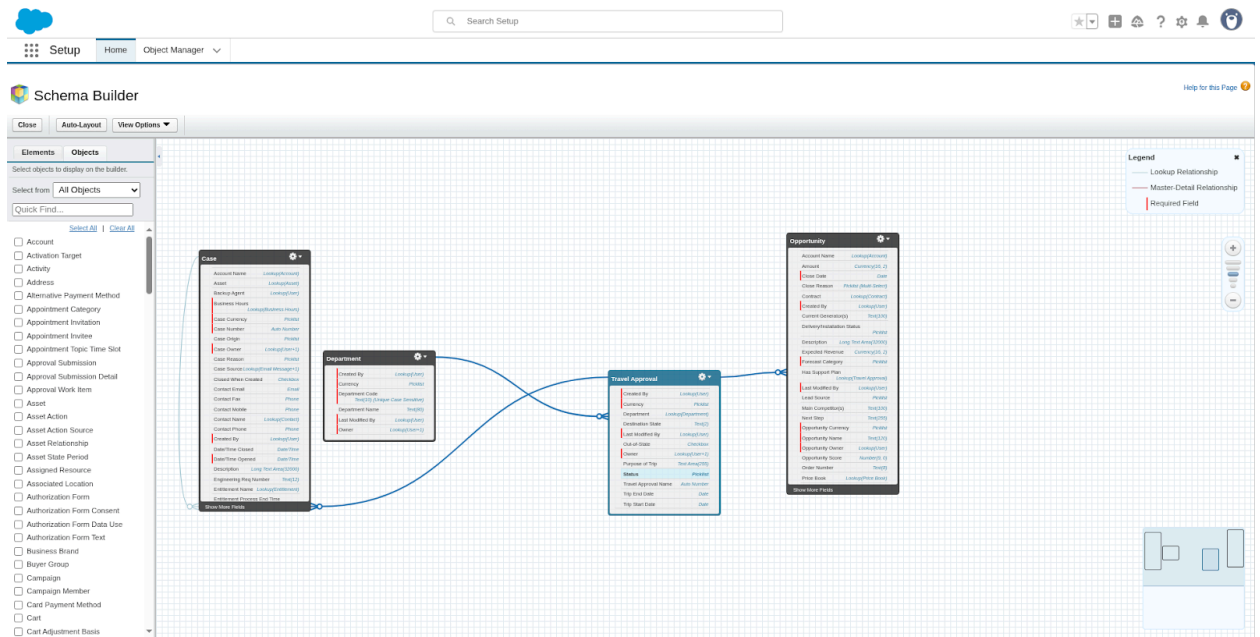
The screenshot shows the Salesforce Setup interface for the 'Travel Approval' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, **Compact Layouts** (selected), Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules, Object Access, Triggers, Flow Triggers, Validation Rules, and Conditional Field Formatting. The main content area is titled 'Travel Approval Compact Layout System Default' with a link to 'Back to Travel Approval'. It displays a table with columns: Label, System Default, Object Name, and Travel Approval. The table has two rows, each with a 'Clone' button and a 'Compact Layout Assignment' button. The first row has 'API Name' as the label and 'SYSTEM' as the system default. The second row has 'Included Fields' as the label and 'Travel Approval Name' as the system default. The 'Object Name' column shows 'Travel Approval' and the 'Travel Approval' column is empty.

Label	System Default	Object Name	Travel Approval
API Name	SYSTEM	Travel Approval	
Included Fields	Travel Approval Name		

● Accounts:

The screenshot displays the Salesforce Setup interface for configuring the 'Account' object. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, and Compact Layouts (which is currently selected). The main content area shows the 'Account Compact Layout System Default' configuration. It includes a table of fields to be displayed on the compact layout, with columns for Label, API Name, System Default, and Included Fields. The table lists fields such as Account Name, Type, Phone, Website, Account Owner, Account Site, Industry, Billing Address, Parent Account, and Annual Revenue. There are also buttons for 'Clone' and 'Compact Layout Assignment'.

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.