

Phase 3 – Operational Configuration (Custom Objects & Relationships)

1. Introduction

This phase sets up **core operational objects, fields, relationships, and layouts** for the Punjab Flood Relief CRM. It ensures the system is ready to manage **Donors, Donations, Volunteers, Relief Requests, and Distributions**, along with reporting and mobile access.

2. Create Custom Objects

Objects to create:

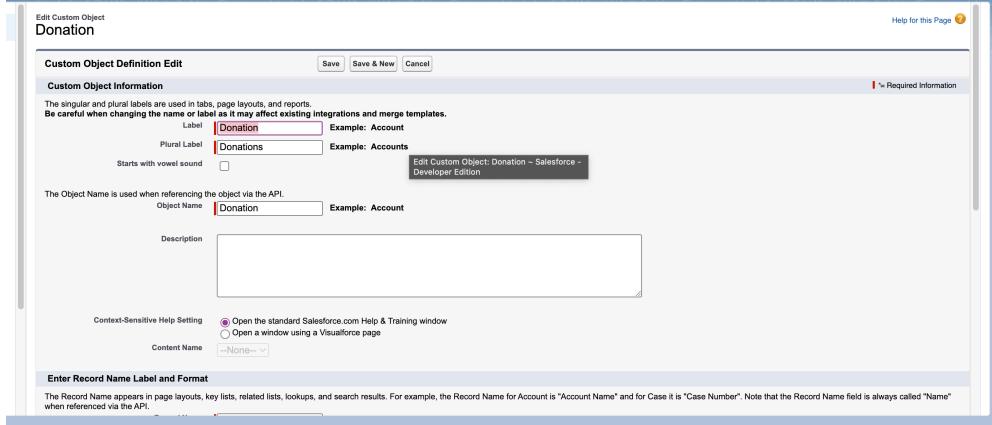
- Donor
- Donation
- Volunteer
- Relief Request
- Distribution

Example: Create Donation object

Navigate: Setup → Object Manager → Create → Custom Object

- Fill details:
 - Label: Donation
 - Plural Label: Donations
 - API Name: Donation__c (auto)
- Check :
 - Allow Reports
 - Allow Activities

- Track Field History (optional)
- Launch New Tab Wizard after saving
- Save.
- Tab Wizard → Style: pick an icon ( or ), Tab Visibility = Default On



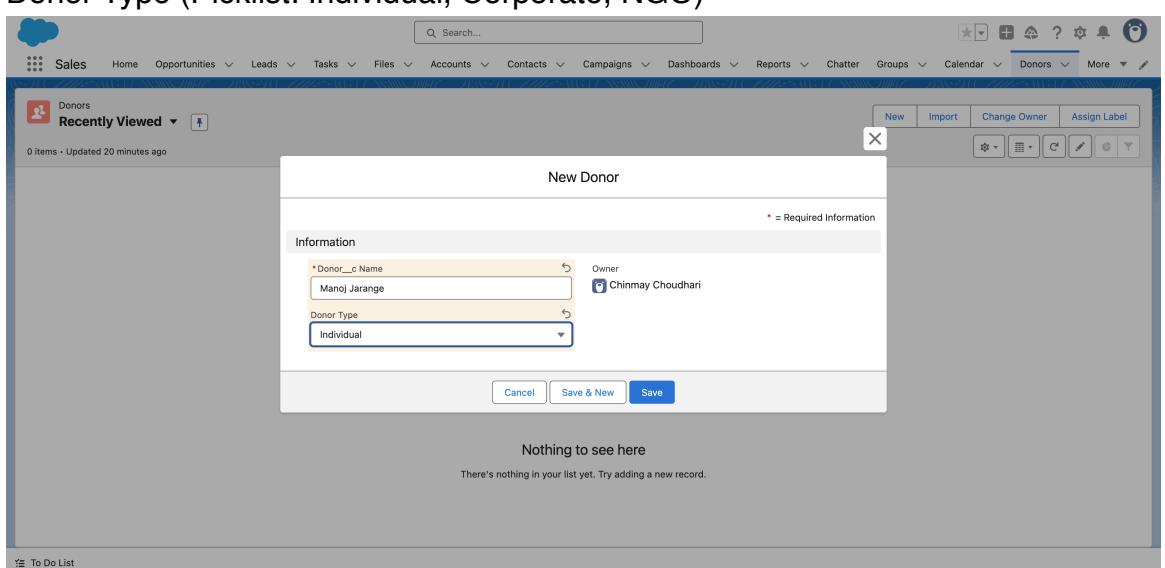
The screenshot shows the 'Edit Custom Object' screen for a custom object named 'Donation'. The 'Custom Object Information' section includes fields for 'Label' (set to 'Donation') and 'Plural Label' (set to 'Donations'). There is a note about API names and a help link. Below this, there's a 'Description' field and a 'Context-Sensitive Help Setting' section with two radio button options. At the bottom, there's a note about record names and a 'Content Name' dropdown set to 'None'.

 Repeat same steps for **Donor, Volunteer, Relief Request, Distribution**

3. Module 2: Add Custom Fields

Donor__c

- Contact Number (Phone)
- Email (Email)
- Donor Type (Picklist: Individual, Corporate, NGO)



The screenshot shows the 'New Donor' dialog box. It contains fields for 'Donor__c Name' (with a note that it's required), 'Owner' (Chinmay Choudhari), and 'Donor Type' (set to 'Individual'). At the bottom, there are 'Cancel', 'Save & New', and 'Save' buttons. Below the dialog, a message says 'Nothing to see here' and 'There's nothing in your list yet. Try adding a new record.'

Donation__c

- Donation Type (Picklist: Food, Clothes, Money, Medicines)
- Donation Amount (Currency)
- Status (Picklist: Pledged, Received, Distributed)
- Lookup → Donor__c

New Donation

Information

- Donation Name: MJ's donation
- Owner: Chinmay Choudhari
- Donation Type: Money
- Donation Amount: ₹1,000.00
- Status: Received
- Donor: Manoj Jarange

Cancel Save & New Save

Volunteer__c

- Skillset (Picklist: Medical, Logistics, Transport, General)
- Availability (Checkbox)
- Location (Text)

New Volunteer

Information

- Volunteer Name: Sharad Pawar
- Owner: Chinmay Choudhari

Cancel Save & New Save

Nothing to see here
There's nothing in your list yet. Try adding a new record.

Relief_Request__c

- Disaster Type (Picklist: Flood, Earthquake, Fire, Other)
- Urgency (Picklist: Low, Medium, High)
- Needed Items (Text Area)
- Status (Picklist: Open, In Progress, Fulfilled)

New Relief Request

Information

- Relief Requests Name: Need Money
- Disaster Type: Flood
- Urgency: High
- Needed Items: Money
- Status: Open

Owner: Chinmay Choudhari

Buttons: Cancel, Save & New, Save

Distribution__c

- Lookup → Donation__c
- Lookup → Volunteer__c
- Lookup → Relief_Request__c
- Status (Picklist: Assigned, Delivered, Pending)

New Distribution

Information

- Distribution Name: Money for need
- Donation: M.J.'s donation
- Relief Request: Need Money
- Volunteer: Sharad Pawar
- Status: Assigned

Owner: Chinmay Choudhari

Buttons: Cancel, Save & New, Save

4. Record Types, Page Layouts, Compact Layouts

Record Types:

- Example: Relief Request → Flood Request vs Earthquake Request
- Purpose: Different picklist defaults for different users

Page Layouts:

- Donation Layout → Donor Manager sees **Amount + Status** at top
- Volunteer Layout → Minimal fields for volunteers

Compact Layouts (for mobile):

- Donation: [Donation Type, Amount, Status]
- Volunteer: [Name, Skillset, Availability]

Screenshot placeholders:

- [Insert Record Type setup screenshot here]
- [Insert Page Layout screenshot here]
- [Insert Compact Layout screenshot here]

5. Define Relationships

Relationships:

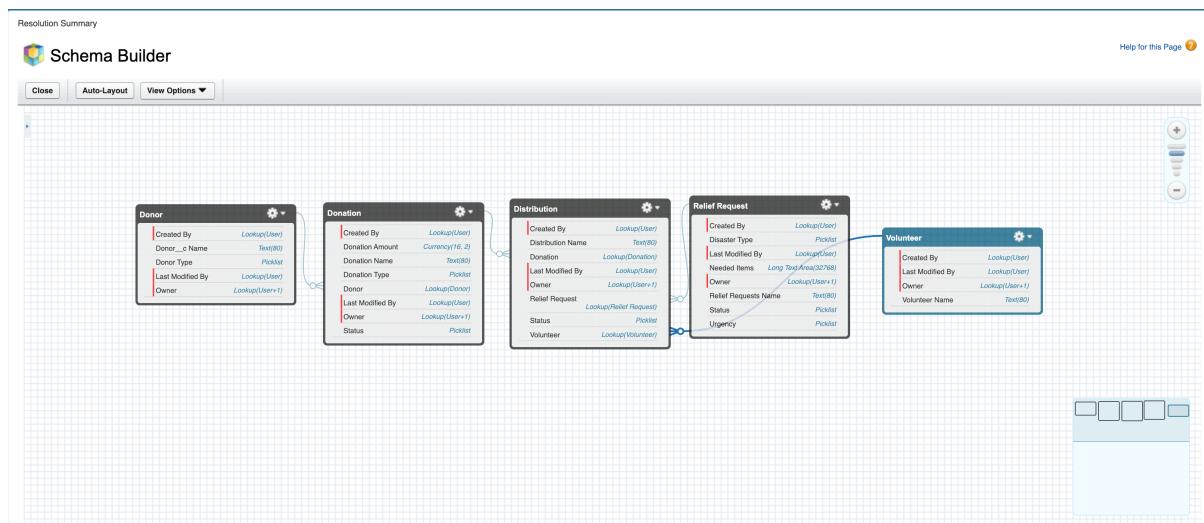
- **Donor → Donation (1:M)** → Add Lookup(Donor) field on Donation
- **Relief Request ↔ Donation (M:M)** → Use **Distribution__c** as junction object
- **Volunteer ↔ Distribution (M:M)** → Distribution__c lookup to Volunteer__c

Distribution__c connects **Donations, Requests, and Volunteers**

6. Schema Builder (Visualization)

Navigate: Setup → Quick Find → Schema Builder

- Select objects: **Donor, Donation, Volunteer, Relief Request, Distribution**
- Drag objects on canvas
- Visualize:
 - Donor → Donation (1:M)
 - Donation ↔ Relief Request (via Distribution)
 - Volunteer ↔ Distribution (M:M)



7. Phase 3 Conclusion

Phase 3 ensures the Salesforce Org is fully **operational for managing Donors, Donations, Volunteers, Relief Requests, and Distributions**. With **custom objects, fields, layouts, relationships, and Schema Builder visualization**, your org is ready for **data entry, reporting, and demo presentations**.