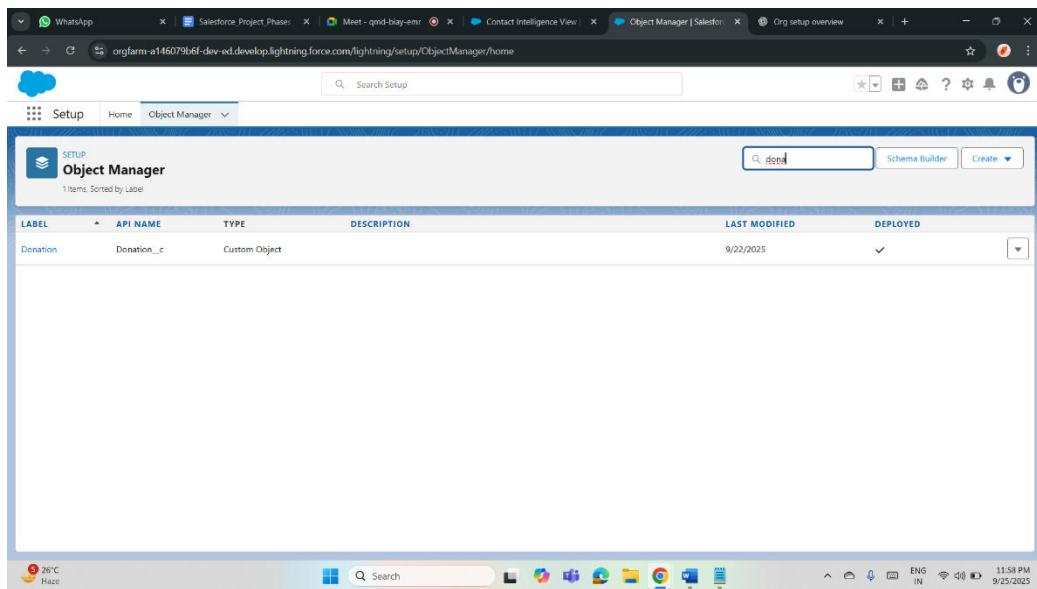


Phase 3: Data Modeling & Relationships

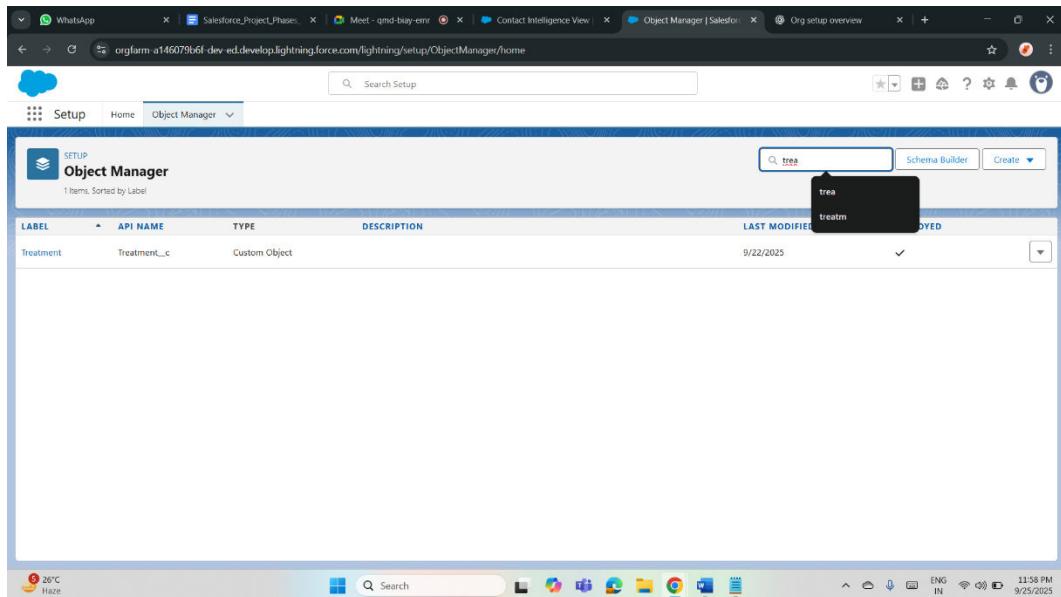
Standard & Custom Objects:

Healthcare uses standard objects like Contacts for patients and Accounts for hospitals, while custom objects manage appointments or medical records. Donation systems use Opportunities for donations, Contacts for donors, and custom objects for campaigns or events. Combining standard and custom objects supports specialized workflows.



The screenshot shows the Salesforce Object Manager interface. The search bar at the top contains the text 'don'. A table below lists one item: 'Donation__c' (Custom Object), last modified on 9/22/2025, and deployed. The table has columns for Label, API Name, Type, Description, Last Modified, and Deployed.

Label	API Name	Type	Description	Last Modified	Deployed
Donation	Donation__c	Custom Object		9/22/2025	✓

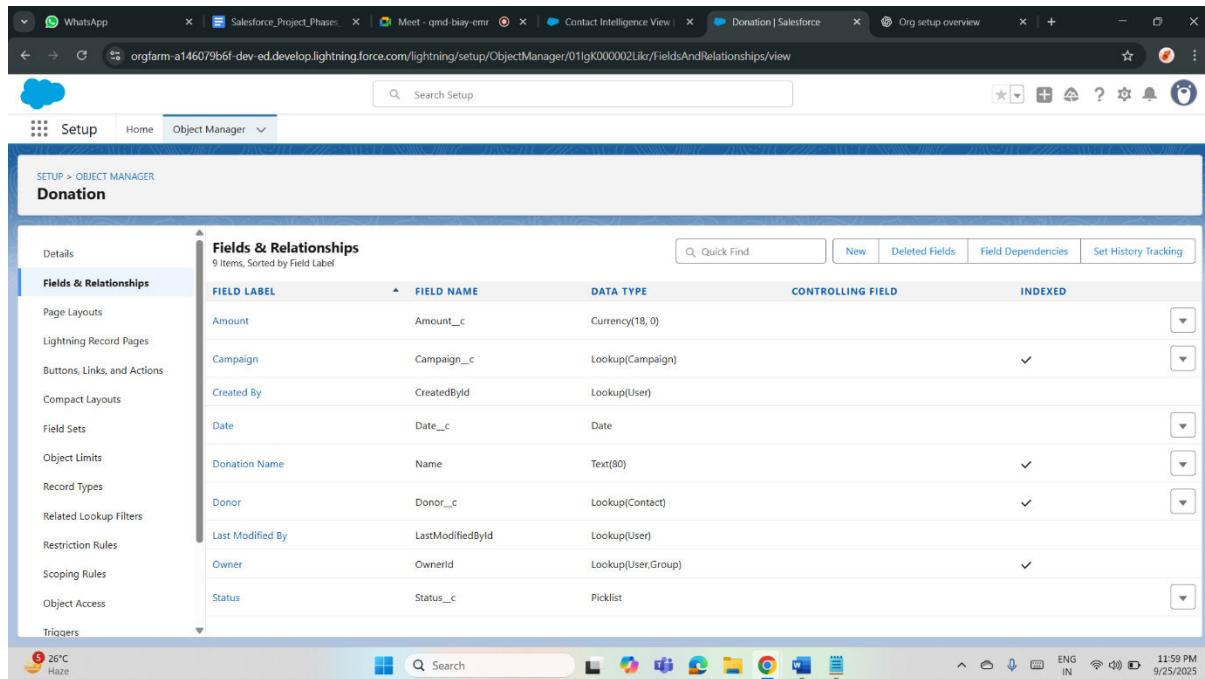


The screenshot shows the Salesforce Object Manager interface. The search bar at the top contains the text 'trea'. A table below lists one item: 'Treatment__c' (Custom Object), last modified on 9/22/2025, and deployed. The table has columns for Label, API Name, Type, Description, Last Modified, and Deployed. The row for 'Treatment__c' is highlighted with a black box.

Label	API Name	Type	Description	Last Modified	Deployed
Treatment	Treatment__c	Custom Object		9/22/2025	✓

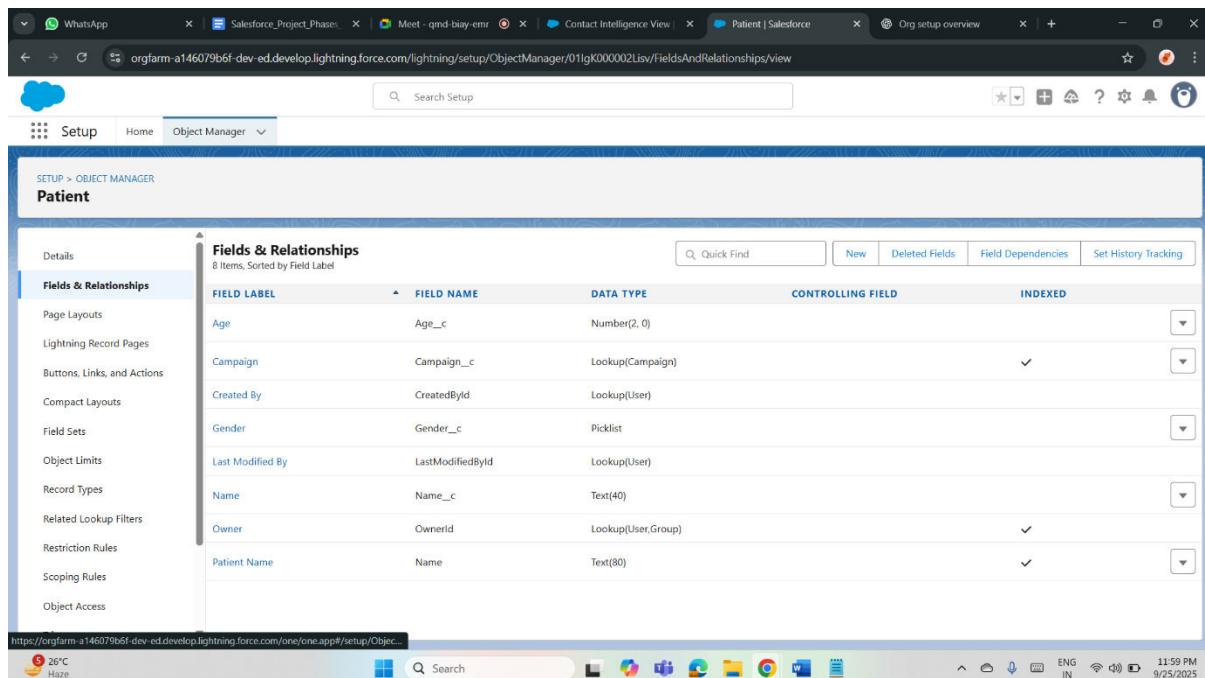
Fields:

Healthcare systems need fields for patient details (age, medical history, allergies). Donation systems need fields for donor preferences, contribution frequency, and pledge amount. Custom fields capture project-specific data, while validation rules ensure accuracy and compliance. Fields structure critical information and support reports and automation.



The screenshot shows the Salesforce Setup interface under 'Object Manager'. The left sidebar has 'Fields & Relationships' selected. The main area displays a table titled 'Fields & Relationships' with 9 items, sorted by Field Label. The columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The data includes:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount_c	Currency(18, 0)		
Campaign	Campaign_c	Lookup(Campaign)		✓
Created By	CreatedById	Lookup(User)		
Date	Date_c	Date		
Donation Name	Name	Text(80)		✓
Donor	Donor_c	Lookup(Contact)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Status	Status_c	Picklist		



The screenshot shows the Salesforce Setup interface under 'Object Manager'. The left sidebar has 'Fields & Relationships' selected. The main area displays a table titled 'Fields & Relationships' with 8 items, sorted by Field Label. The columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The data includes:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Age	Age_c	Number(2, 0)		
Campaign	Campaign_c	Lookup(Campaign)		✓
Created By	CreatedById	Lookup(User)		
Gender	Gender_c	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name_c	Text(40)		
Owner	OwnerId	Lookup(User,Group)		✓
Patient Name	Name	Text(80)		✓

Record Types:

In healthcare, record types differentiate inpatient vs outpatient records or appointment types. In donation tracking, record types separate one-time donations from recurring pledges or corporate sponsorships. They allow customized processes, page layouts, and picklists to suit specific categories, improving usability and reporting.

Page Layouts:

Healthcare page layouts display vital signs, treatment plans, and contact information. Donation systems display donor history, pledge details, and related campaigns. Custom page layouts present role-based, relevant information to users, improving efficiency while ensuring sensitive or unnecessary details remain hidden.

Compact Layouts:

Compact layouts in healthcare highlight patient name, age, and emergency contact on mobile or quick views. In donation systems, donor name, pledged amount, and donation status appear at the top. Compact layouts deliver essential information at a glance, enhancing productivity and mobile usability.

Schema Builder:

Healthcare projects use Schema Builder to visualize patient, doctor, and treatment relationships. Donation systems map donors, donations, campaigns, and volunteers. Schema Builder provides a drag-and-drop interface to design, understand, and maintain data models, making relationships and dependencies easy to manage.

Lookup vs Master-Detail vs Hierarchical Relationships:

Healthcare uses lookup for patient–insurance links, master-detail for prescription–medication records, and hierarchical for internal staff management. Donation systems use lookup for donor–event relations, master-detail for campaign–donation management, and hierarchical for organizing

fundraiser teams. Choosing the right relationship ensures proper dependency and reporting.

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. Under the 'Treatment' object, the 'Fields & Relationships' tab is active. The table lists the following fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Date	Date_c	Date		
Funded_By	Funded_By_c	Lookup(Donation)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		
Patient	Patient__c	Lookup(Patient)		
Treatment Name	Name	Text(80)		
Treatment Type	Treatment_Type__c	Picklist		

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. The table lists the 'Patient' object:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Patient	Patient__c	Custom Object		9/22/2025	✓