Phase 3: Data Modelling & Relationships

Goal:

To design and build the data structure for the Lead Management System in Salesforce, defining how different objects, fields, and relationships will work together.

1. **Objects Used:**

*   Standard: Lead, Contact, Account.

*   Custom (Optional): Lead Assignment History, Lead Notes/Interactions.

2. **Key Fields:**

*   Lead: Name, Company, Email, Phone, Lead Status, Lead Source.

*   Contact: Name, Email, Phone, Account (after conversion).

*   Account: Name, Industry, Revenue.

3. **Record Types & Layouts:**

*   Separate record types for B2B & B2C leads.

*   Custom page layouts to show lead details, tasks, and activities.

*   Compact layout for mobile view.

4. **Relationships:**

*   Lead → Contact → Account → Opportunity flow.

*   Lookup used for assignment; master-detail not required.

Lead Status Flow :-

Step	Status	Action
1	New	Lead enters system
2	Contacted	Rep reaches out to lead
3	Qualified	Lead shows interest and meets criteria
4	Converted	Lead becomes customer
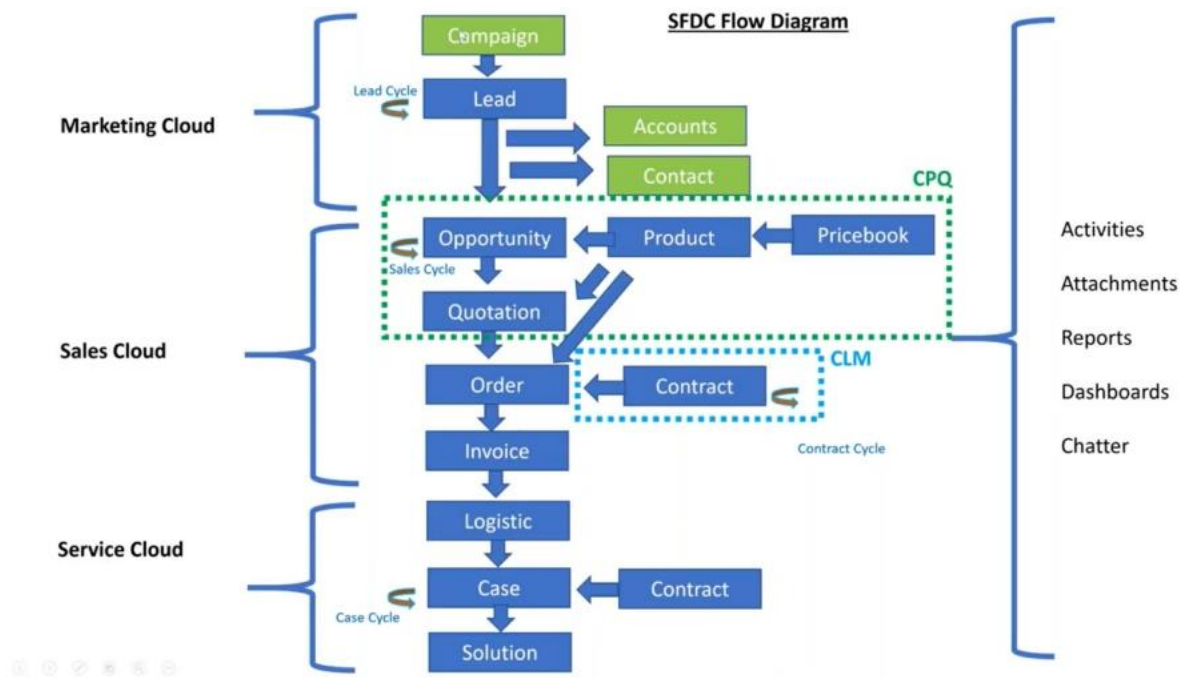
Dia : SFDC Flow Diagram

5.   Junction Objects

- Not required for basic lead management.

- Could be used if one **Lead** was linked to multiple **Campaigns** — a **Lead-Campaign Junction Object** could be created.

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6. . External Objects

If marketing or CRM data exists outside Salesforce (like in a Google Sheet or external database), **External Objects** can be used to connect and sync that data through **Salesforce Connect**.