Salesforce Project Phase-3

Phase 3: Data Modeling & Relationships
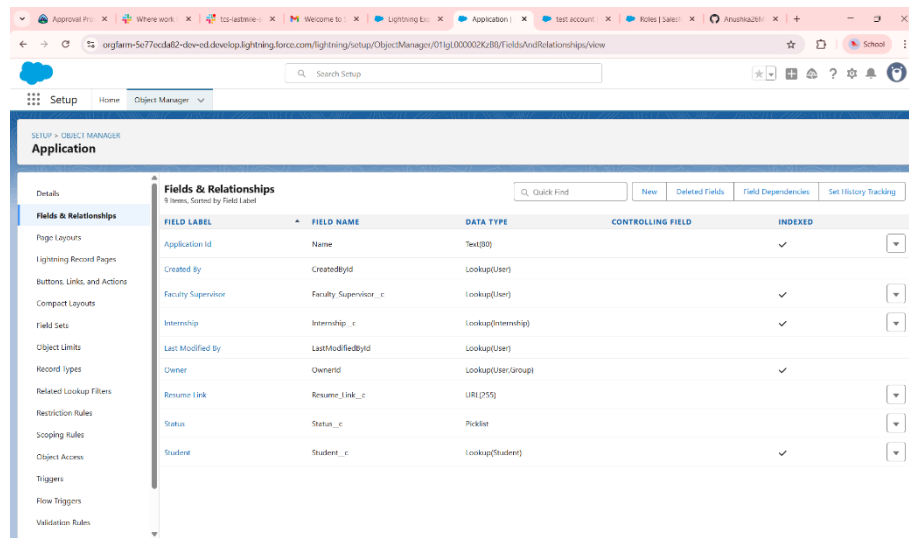
❖ **Standard and Custom Objects:**
   All the required standard and custom objects for the project have already been created in the previous phase.

   Standard Objects : User → Represents system users such as **Placement Officers, Admins, and Students**

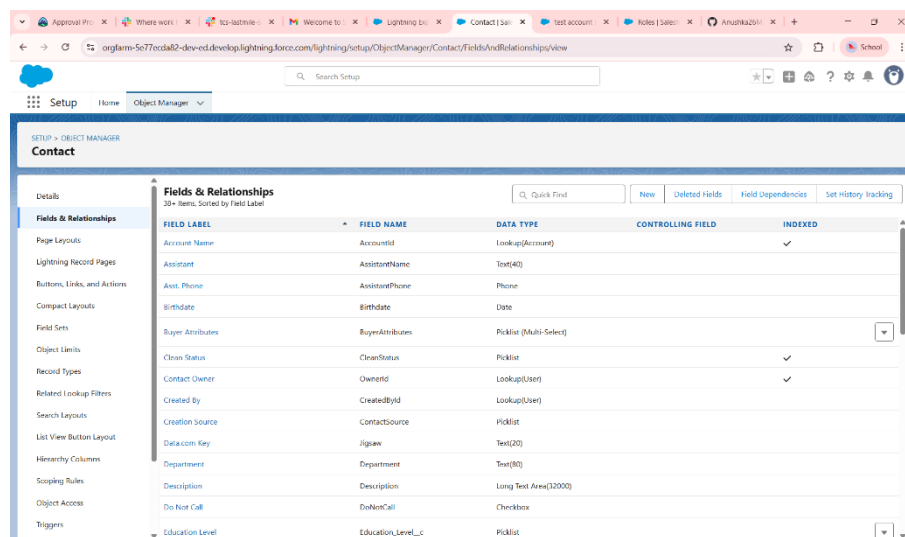   Custom Objects: Student, Company, Internship, Feedbacks, Internship Application

FIELDS

➢ Go to Setup.
➢ Click on the Object Manager, select the Account , Contact , Student , Placement Officer , recommendation , Application , Internship
➢ Now click on the Fields & Relationships and click on New.

Fields & Relationships
6 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Internship	Internship__c	Lookup(Internship)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Recommendation Id	Name	Text(80)		✓
Student	Student__c	Lookup(Student)		✓

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Object Access
Triggers
Flow Triggers
Validation Rules

Fields & Relationships
8 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Application	Application__c	Lookup(Application)		✓
Comments	Comments__c	Long Text Area(32768)		
Created By	CreatedById	Lookup(User)		
Internship Name	Name	Text(80)		✓
Interviewer Name	Interviewer_Name__c	Text(50)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Rating	Rating__c	Picklist		

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Fields & Relationships
44 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
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		
Channel Program Level Name	ChannelProgramLevelName	Text(255)		
Channel Program Name	ChannelProgramName	Text(255)		
Clean Status	CleanStatus	Picklist		✓
Created By	CreatedById	Lookup(User)		
Customer Portal Account	IsCustomerPortal	Checkbox		
Customer Priority	CustomerPriority__c	Picklist		

Details
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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

Fields & Relationships
8 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Department	Department__c	Text(100)		
Email	Email__c	Email (Unique)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone	Phone__c	Phone		
Placement Officer Name	Name	Text(80)		✓
Role	Role__c	Picklist		

Details
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Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
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Record Types
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Scoping Rules
Object Access
Triggers
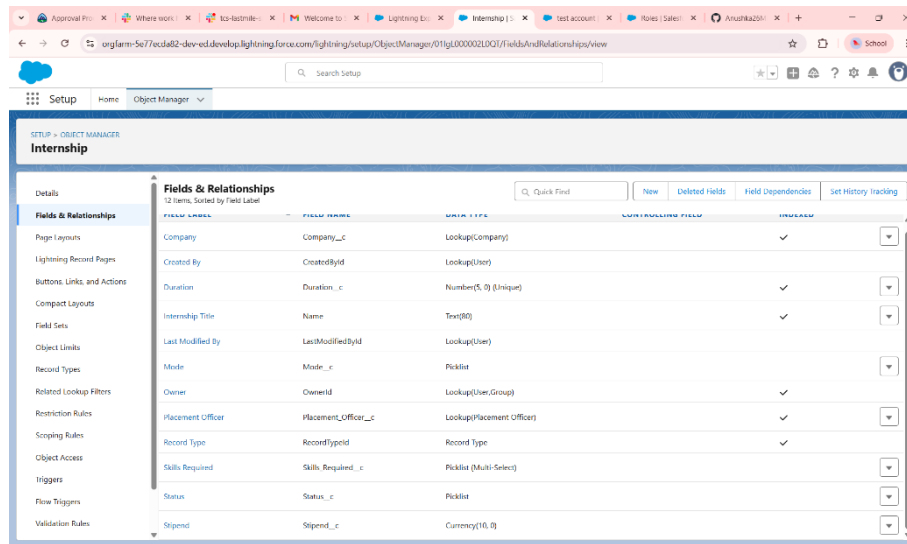
Record type

❖ **Record Types:**
  ➢ Go to Setup.
  ➢ Click On Object Manager and click on required object.
  ➢ Click on Record Type and then click New.
  ➢ Student:
    • Postgraduate:

    • **Record Type:** Master
    • **Record Type Label:** Postgraduate Student
    • **Record Type Name:** Postgraduate_Student
    • **Description:** Students pursuing postgraduate programs
    • **Active:** Enable
    • **Layout:** Apply a different layout for each profile
    • Click **Save**

    • **Undergraduate Student**

    • **Record Type:** Master
    • **Record Type Label:** Undergraduate Student
    • **Record Type Name:** Undergraduate_Student
    • **Description:** Students pursuing undergraduate programs
    • **Active:** Enable
    • **Layout:** Apply a different layout for each profile
    • Click **Save**
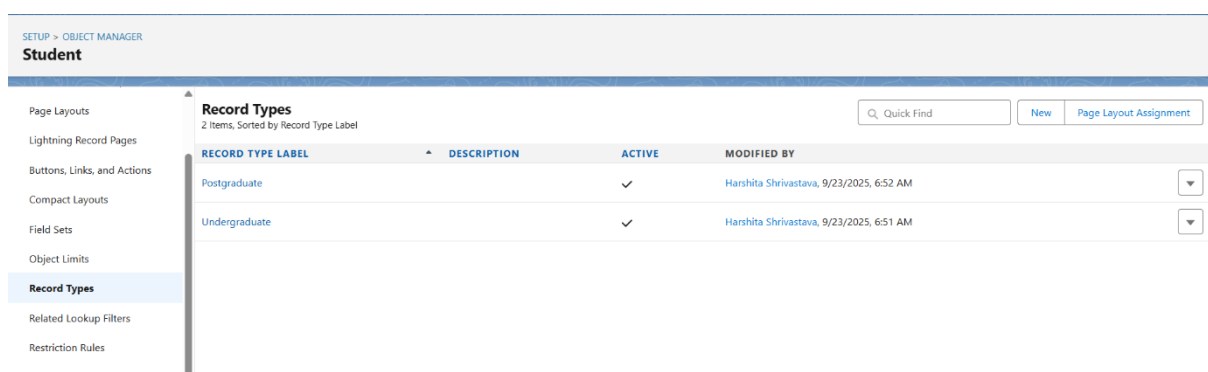
1. **Applied**

- **Record Type:** Master
- **Record Type Label:** Applied
- **Record Type Name:** Applied
- **Description:** Applications submitted by students but not yet reviewed
- **Active:** Enable
- **Layout:** Apply different layout per profile
- Click **Save**

2. **Selected**

- **Record Type:** Master
- **Record Type Label:** Selected
- **Record Type Name:** Selected
- **Description:** Students selected for the internship
- **Active:** Enable
- **Layout:** Apply different layout per profile
- Click **Save**

3. **Rejected**

- **Record Type:** Master
- **Record Type Label:** Rejected
- **Record Type Name:** Rejected
- **Description:** Applications that were not selected
- **Active:** Enable
- **Layout:** Apply different layout per profile
- Click **Save**

SETUP > OBJECT MANAGER				
Application				

	Record Types 4 Items, Sorted by Record Type Label			Quick Find	New	Page Layout Assignment
Details	**RECORD TYPE LABEL** ▲	**DESCRIPTION**	**ACTIVE**	**MODIFIED BY**		
Fields & Relationships						
Page Layouts	Applied	Applications submitted by students but not yet reviewed	✓	Harshita Shrivastava, 9/24/2025, 7:31 AM		▼
Lightning Record Pages	Rejected	Applications that were not selected	✓	Harshita Shrivastava, 9/24/2025, 7:32 AM		▼
Buttons, Links, and Actions						
Compact Layouts	Selected	Students selected for the internship	✓	Harshita Shrivastava, 9/24/2025, 7:32 AM		▼
Field Sets	Technical Internship		✓	Harshita Shrivastava, 9/23/2025, 12:50 PM		▼
Object Limits						

Page Layout

1. **Go to Setup.**

2. **Click on Object Manager.**

3. Select the required object, such as:

   o **Students**

   o **Internship Applications**

   o **Companies**

   o **Placement Officers**

   o **Feedback**

4. **In the left panel, click on Page Layouts.**

5. **Click Edit on the default Page Layout (or create a new one if needed).**

6. **Make sure all relevant fields are organized properly in sections like:**

   o **Information / Details Section → General information about the record**

   o **Status / Progress Section → For tracking application or internship status**

   o **Notes / Feedback Section → Any comments or feedback**

7. **If fields are not in the correct section, drag and drop them into the appropriate section.**

8. **Save the layoutt**

Compact Layout

1. **Go to Setup.**

2. **Click on Object Manager.**

3. **Select the required object, such as:**

   o **Students**

   o **Internship Applications**

   o **Companies**

   o **Placement Officers**

4. **In the left panel, click on Compact Layouts.**

5. **Click New.**

➢ **Students Object**

- **Label: Students Compact Layout**

- **Name: Students_Compact_Layout**

- **Fields to display: Student_ID, Record Type, First_Name, Last_Name, Email, Contact_Number, Skills, Education**

- **Click Save**

- **Click on Compact Layout Assignment and click Edit**

- **In the dropdowns, select Students Compact Layout**

- **Click Save**

Internship Object

⬡ **Label: Internship Compact Layout**

⬡ **Name: Internship _Compact_Layout**

⬡ **Fields to display: Application_ID, Record Type, Student_Name, Internship_Name, Status, Applied_Date**

⬡ **Click Save**

⬡ **Click on Compact Layout Assignment → select Internship Compact Layout → Click Save**

Schema builder

▢ **Go to Setup.**

▢ **In the Quick Find box, type Schema Builder and click on it.**

▢ **In the left panel, enable the objects relevant to your project:**

- **Students**

- **Internship Applications**

- **Companies**

- **Placement Officers**

- **Feedback**

▢ **Click on Auto-Layout to automatically arrange the objects and their relationships on the canvas.**

▢ **Use Schema Builder to visualize object relationships, such as:**

- **Students → Internship Applications (lookup or master-detail)**

- **Companies → Internship Applications**

- **Placement Officers → Internship Applications (if needed for assignment/tracking)**
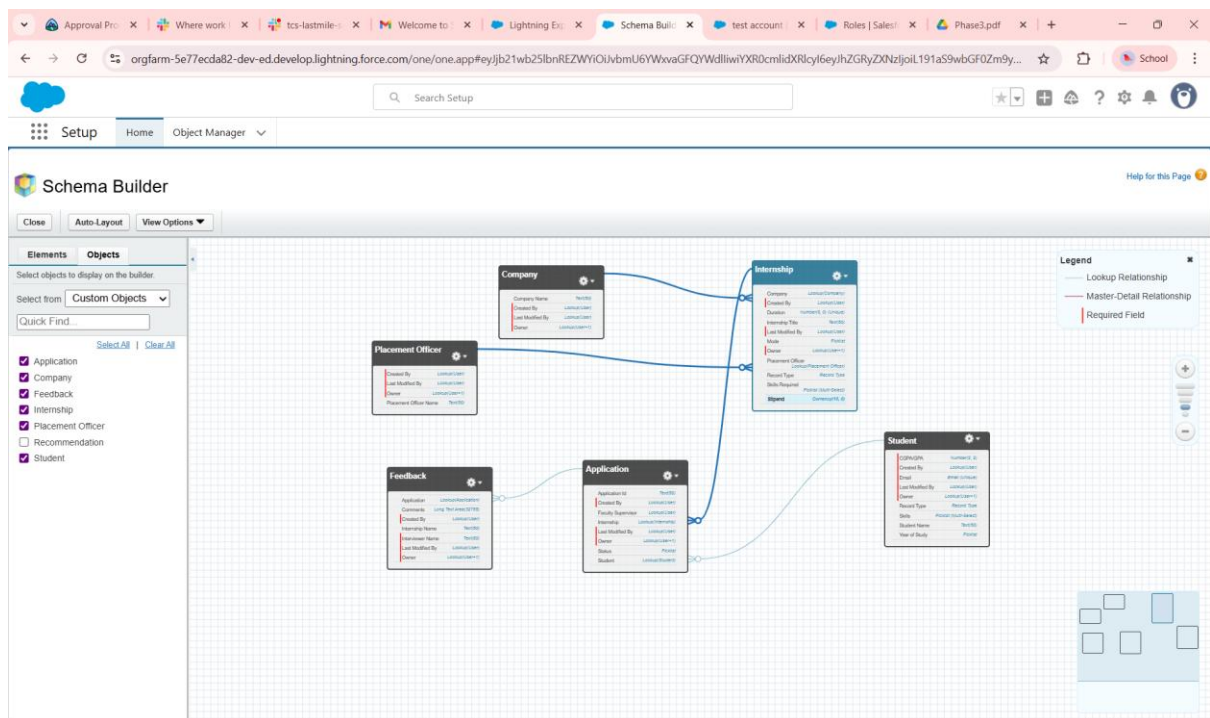
1. Lookup Relationships

- **Students → Internship Applications**
  Each student can apply to multiple internships. An application record looks up to a student.

- **Companies → Internship Applications**
  Each application looks up to a company posting the internship. If the company record is deleted, the application can still exist.

- **Placement Officers → Internship Applications**
  Internship applications are linked to placement officers using a lookup relationship for tracking purposes.

2. Master–Detail Relationships

- **Internship Applications → Feedback**
  A feedback record depends on an application. If the application is deleted, the related feedback record is also deleted.

- **Companies → Internships (optional)**
  If you model internships separately from companies, each internship depends on the company. If the company is deleted, all related internships are also deleted.

3. Hierarchical Relationship

- **User Object**
  A senior placement officer can supervise junior placement officers or student coordinators. This relationship type is only available on the **User object** and helps in managing approvals and reporting structures in the internship system.

Junction Object

Steps to Create Junction Object:

1. Go to **Setup**.

2. Click on **Object Manager** → **Create** → **Custom Object**.

3. Fill the details:

   o **Label:** Internship Application

   o **Object Name:** Internship_Application__c

   o Enable **Allow Reports**, **Allow Activities**, and **Track Field History**

4. Click on **Save**.

Create Master–Detail Relationships

1. In the **Internship Application** object, go to **Fields & Relationships** → **New**.

   o Select **Master–Detail Relationship** → **Next**

   o **Field Label:** Student

   o **Field Name:** Student__c

   o Click **Save**

2. Again, go to **Fields & Relationships** → **New**.

   o Select **Master–Detail Relationship** → **Next**

   o **Field Label:** Internship

   o **Field Name:** Internship__c

   o Click **Save**

Page Layout Assignment

- Go to **Page Layouts** for Internship Application.

- Select **Internship Application Layout** and assign it.

- Click **Save**.

Report Creation

1. Open **App Launcher** → Select **Reports**.

2. Click on **New Report**.

3. Select the report type: **Internship Applications**.

4. Click **Start Report**.

5. Drag **Student** and **Internship** fields into the report columns.

6. Click **Save & Run**.

   o **Report Name:** Student–Internship Applications

   o Save under **Internship Management Reports** folder.

Dashboard Creation

1. Open **App Launcher** → Select **Dashboards**.

2. Click on **New Dashboard**.

   o **Name:** Internship Tracking Dashboard

   o Click **Create**

3. Click on **+Widget** → Choose **Table**.

4. Select the **Student–Internship Applications Report**.

5. Click on **Save** → then **Done**.

External Object

☐ Go to **Setup**.

☐ In the **Quick Find** box, type **External Data Sources** → click it.

☐ Click **New External Data Source**.

☐ the details:

- **Label:** Internship Ratings Data

- **Name:** Internship_Ratings_Data

- **Type:** OData 4.0

- **URL:** https://services.odata.org/V4/Northwind/Northwind.svc/

- **Identity Type:** Named Principal

- **Authentication Protocol:** No Authentication

- Click **Save**.

- Click **Validate and Sync**.

- Select company and peoplr to sync

- Click **Sync**.