

Project Title: Sales Performance Reporting

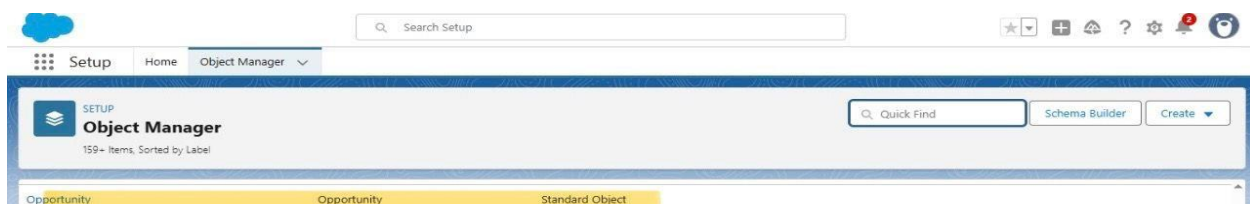
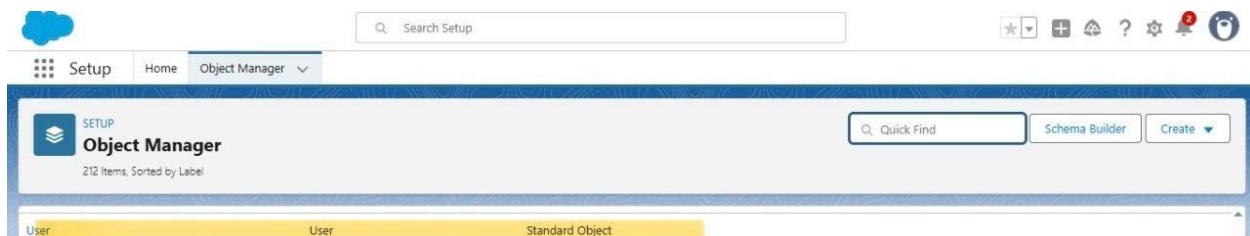
Phase 3: Data Modeling & Relationships

Objective:

Design the Salesforce data model that will support sales tracking, quota management, and performance reporting. This phase defines how Accounts, Opportunities, Users, and custom objects (like Sales Target) are structured and related.

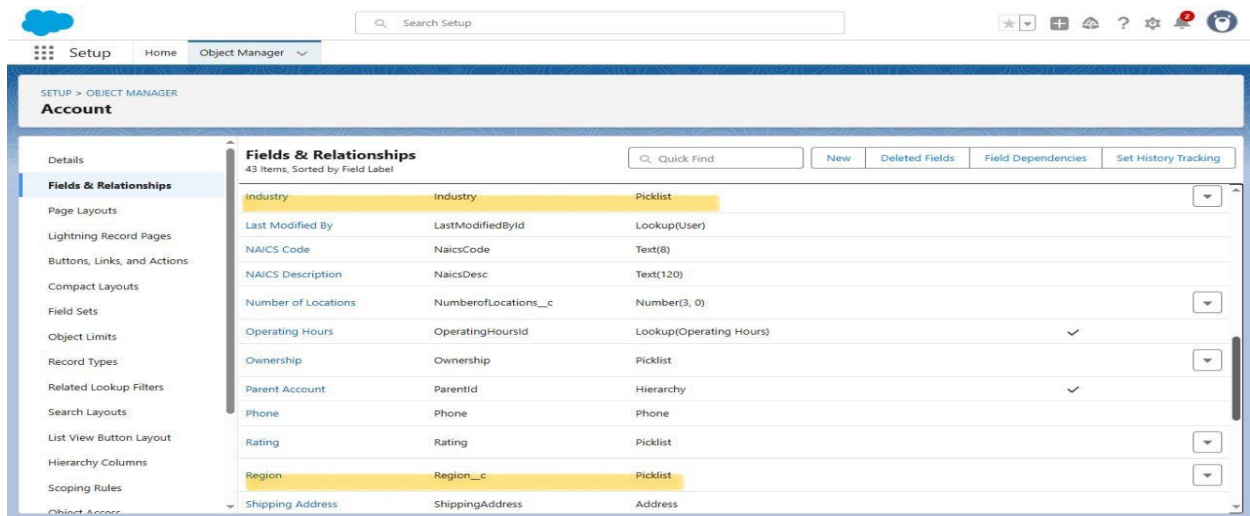
1. Standard & Custom Objects

- **Standard Objects:**
 - **Account** → Stores customer or company details.
 - **Opportunity** → Tracks sales deals, revenue, and pipeline stages.
 - **User** → Represents Sales Reps and Managers.
- **Custom Objects:**
 - **Sales Target (Quota)** → Captures quota values for each Sales Rep (Monthly/Quarterly).
 - **Region (Optional)** → To group Accounts and Opportunities by geography.



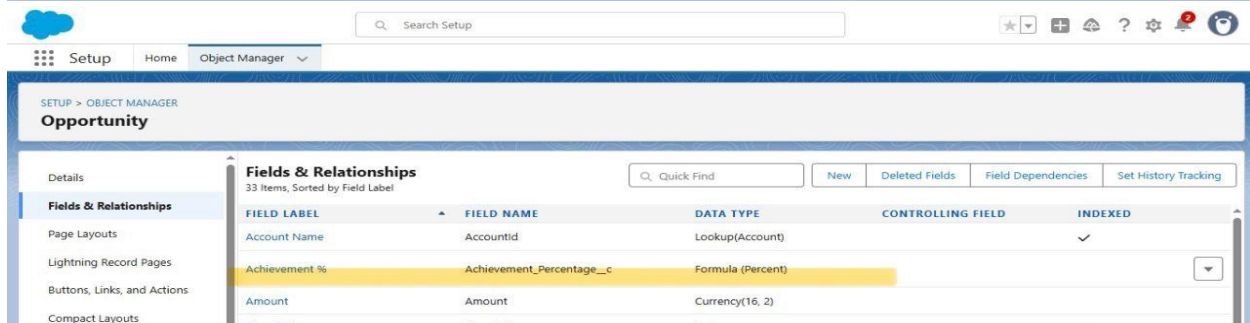
2. Fields

- **Account:**
 - Region (Picklist: North, South, East, West, Central)
 - Industry (Picklist: IT, Finance, Retail, etc.)
- **Opportunity:**
 - Quota (Currency)
 - Achievement % (Formula = $\text{Amount} \div \text{Quota} \times 100$)
 - Deal Size (Picklist: Small, Medium, Large)
 - Expected Revenue (Formula = $\text{Amount} \times \text{Probability}$)
- **Sales Target:**
 - Rep Name (Lookup → User)
 - Period (Picklist: Monthly, Quarterly)
 - Quota Value (Currency)
 - Target Start Date (Date)
 - Target End Date (Date)



The screenshot shows the Salesforce Setup interface, specifically the Object Manager for the Account object. The left sidebar lists various setup options, with 'Fields & Relationships' selected. The main area displays a table of fields for the Account object, sorted by field label. The table includes columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The fields listed are: Industry (Picklist), Last Modified By (Lookup(User)), NAICS Code (Text(8)), NAICS Description (Text(120)), Number of Locations (Number(3, 0)), Operating Hours (Lookup(Operating Hours)), Ownership (Picklist), Parent Account (Hierarchy), Phone (Phone), Rating (Picklist), Region (Picklist), and Shipping Address (Address).

Field Label	Field Name	Data Type	Controlling Field	Indexed
Industry	Industry	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
NAICS Code	NaicsCode	Text(8)		
NAICS Description	NaicsDesc	Text(120)		
Number of Locations	NumberOfLocations_c	Number(3, 0)		
Operating Hours	OperatingHoursId	Lookup(Operating Hours)		
Ownership	Ownership	Picklist		
Parent Account	ParentId	Hierarchy		
Phone	Phone	Phone		
Rating	Rating	Picklist		
Region	Region_c	Picklist		
Shipping Address	ShippingAddress	Address		



The screenshot shows the Salesforce Setup interface, specifically the Object Manager for the Opportunity object. The left sidebar lists various setup options, with 'Fields & Relationships' selected. The main area displays a table of fields for the Opportunity object, sorted by field label. The table includes columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The fields listed are: Account Name (Lookup(Account)), Achievement % (Formula (Percent)), Amount (Currency(16, 2)), and Close Date (Date).

Field Label	Field Name	Data Type	Controlling Field	Indexed
Account Name	AccountId	Lookup(Account)		
Achievement %	Achievement_Percentage_c	Formula (Percent)		
Amount	Amount	Currency(16, 2)		
Close Date	CloseDate	Date		

Related Lookup Filters	Price Book	Pricebook2id	Lookup(Price Book)	✓
Search Layouts	Primary Campaign Source	CampaignId	Lookup(Campaign)	✓
List View Button Layout	Private	IsPrivate	Checkbox	
Scoping Rules	Probability (%)	Probability	Percent(3, 0)	
Object Access	Quantity	TotalOpportunityQuantity	Number(16, 2)	
Triggers	Quota	Quota__c	Currency(16, 2)	▼

Record Types	Current Generator(s)	CurrentGenerators__c	Text(100)	▼
Related Lookup Filters	Deal Size	Deal_Size__c	Picklist	▼
Search Layouts	Delivery/Installation Status	DeliveryInstallationStatus__c	Picklist	▼
List View Button Layout	Description	Description	Long Text Area(32000)	
Scoping Rules	Expected Revenue	Expected_Revenue__c	Formula (Currency)	▼
Object Access				
Triggers				

Setup Home Object Manager

Search Setup

Setup > OBJECT MANAGER

Sales Target

Details

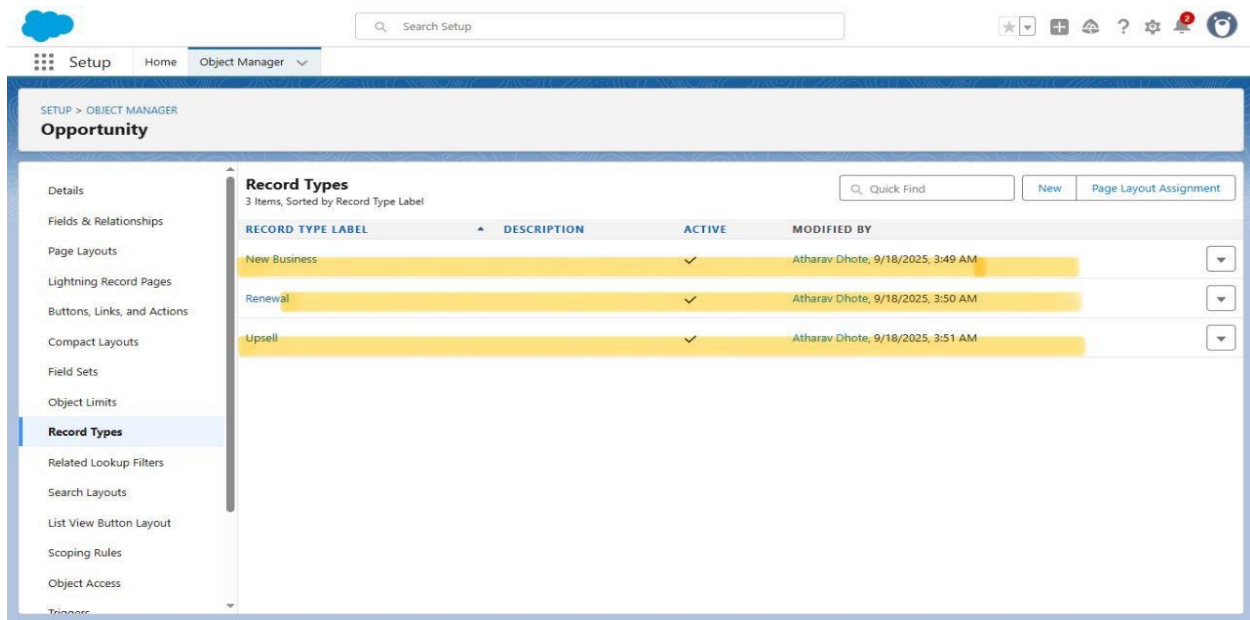
Fields & Relationships 10 Items, Sorted by Field Label

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		▼
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Period	Period__c	Picklist		▼
Quota Value	Quota_Value__c	Currency(16, 2)		▼
Rep Name	Rep_Name__c	Lookup(User)		✓
Target End Date	Target_End_Date__c	Date		▼
Target Number	Name	Auto Number		✓
Target Start Date	Target_Start_Date__c	Date		▼

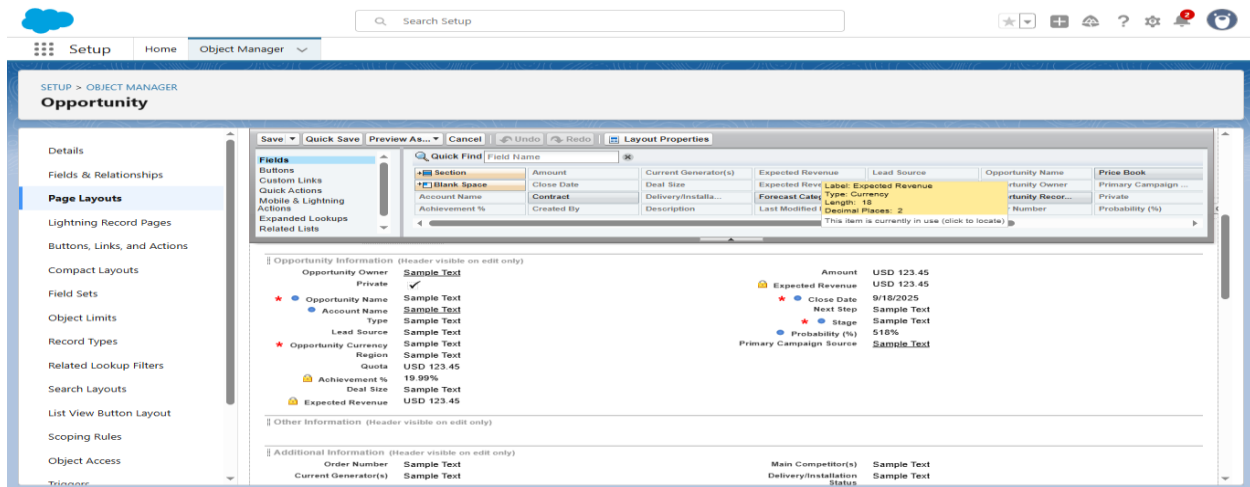
3. Record Types

- **New Business** → Opportunities from new customers.
- **Renewal** → Existing customer contracts renewed.
- **Upsell** → Additional sales to current customers.



4. Page Layouts

- **Opportunity Page Layout:** Add Quota, Achievement %, Deal Size, Expected Revenue. Show Activities, Products, and Quotes as related lists.
- **Account Page Layout:** Add Industry and Region fields, plus Opportunities related list.



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

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

Quick Find Field Name

Fields	Field Name	Field Type	Field Label	Field Format	Field Properties
Account Number	Account Number	Text	Account Number		
Account Owner	Account Owner	Text	Account Owner		
Account Site	Account Site	Text	Account Site		
Account Currency	Account Currency	Text	Account Currency		
Account Source	Account Source	Text	Account Source		
Active	Active	Text	Active		
Annual Revenue	Annual Revenue	Text	Annual Revenue		
Billing Address	Billing Address	Text	Billing Address		
Clean Status	Clean Status	Text	Clean Status		
Created By	Created By	Text	Created By		
Customer Priority	Customer Priority	Text	Customer Priority		
D&B Company	D&B Company	Text	D&B Company		
Data.com Key	Data.com Key	Text	Data.com Key		
Description	Description	Text	Description		
D-U-N-S Number	D-U-N-S Number	Text	D-U-N-S Number		
Employees	Employees	Text	Employees		
Fax	Fax	Text	Fax		
Industry	Industry	Text	Industry		
Last Modified By	Last Modified By	Text	Last Modified By		
Operating Hours	Operating Hours	Text	Operating Hours		
NAICS Code	NAICS Code	Text	NAICS Code		
NAICS Description	NAICS Description	Text	NAICS Description		
Number of Locations	Number of Locations	Text	Number of Locations		
Parent Account	Parent Account	Text	Parent Account		
Rating	Rating	Text	Rating		
Sample Text	Sample Text	Text	Sample Text		
Phone	Phone	Text	Phone		
1-415-555-1212	1-415-555-1212	Text	1-415-555-1212		
Fax	Fax	Text	Fax		
www.salesforce.com	www.salesforce.com	Text	www.salesforce.com		
Website	Website	Text	Website		
Ticker Symbol	Ticker Symbol	Text	Ticker Symbol		
Sample Text	Sample Text	Text	Sample Text		
Ownership	Ownership	Text	Ownership		
Sample Text	Sample Text	Text	Sample Text		
Employees	Employees	Text	Employees		
54,809	54,809	Text	54,809		
SIC Code	SIC Code	Text	SIC Code		
Sample Text	Sample Text	Text	Sample Text		

Account Information (Header visible on edit only)

Field Name	Field Value
Account Owner	Sample Text
Account Name	Sample Text
Parent Account	Sample Text
Account Number	Sample Text
Account Site	Sample Text
Type	Sample Text
Industry	Sample Text
Annual Revenue	USD 123.45
Account Currency	Sample Text
Region	Sample Text
Industry	Sample Text

Address Information (Header visible on edit only)

Field Name	Field Value
Billing Address	Suite 300, The Landmark @ One Market San Francisco, CA 94105 US
Shipping Address	Suite 300, The Landmark @ One Market San Francisco, CA 94105 US

Additional Information (Header visible on edit only)

Field Name	Field Value
Customer Priority	Sample Text
SLA Expiration Date	9/18/2025
SLA	Sample Text
SLA Serial Number	Sample Text
Upsell Opportunity	Sample Text
Number of Locations	152

5. Compact Layouts

- **Opportunity Compact Layout:** Opportunity Name, Stage, Amount, Close Date, Achievement %.
- **Account Compact Layout:** Account Name, Industry, Region.

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
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List View Button Layout
Hierarchy Columns
Scoping Rules
Object Access

Account Compact Layout
Account Highlights
Back to Account Compact Layouts

Compact Layout Detail

Label	Account Highlights	Object Name	Account
API Name	Account_Highlights		
Included Fields	Account Name Industry Region		
Created By	Atharav Dhote, 9/18/2025, 4:50 AM	Modified By	Atharav Dhote, 9/18/2025, 4:50 AM

Edit Clone Delete Compact Layout Assignment

7. Lookup vs Master-Detail vs Hierarchical

- **Account → Opportunity:** Standard Lookup.
- **User → Opportunity:** Owner relationship.
- **Sales Target → User:** Lookup.
- **Hierarchical (User-to-User):** Used for reporting manager relationships.