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.
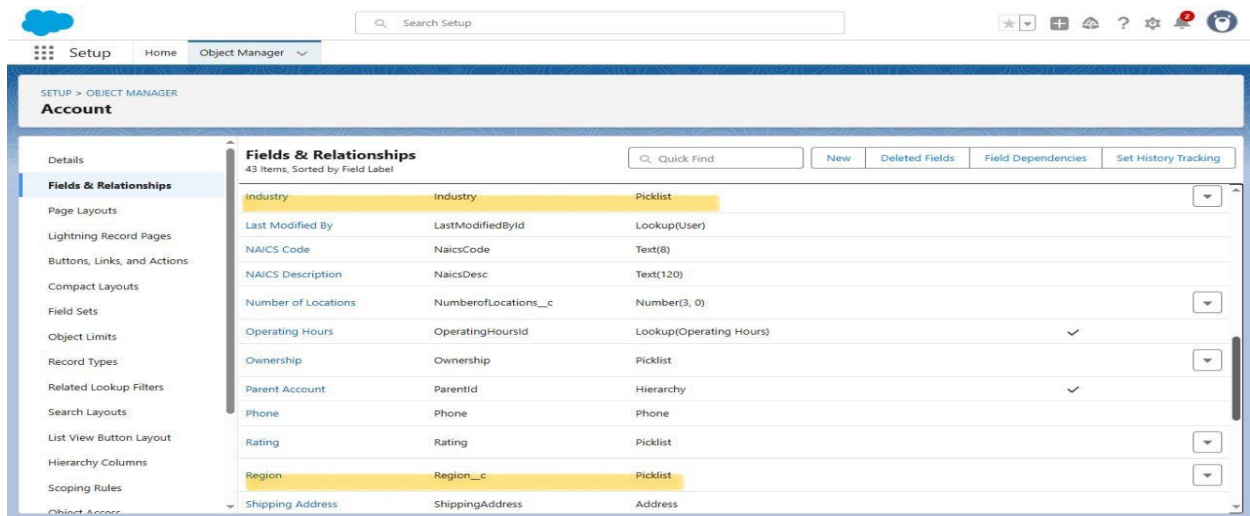
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1. Standard & Custom Objects

- **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).
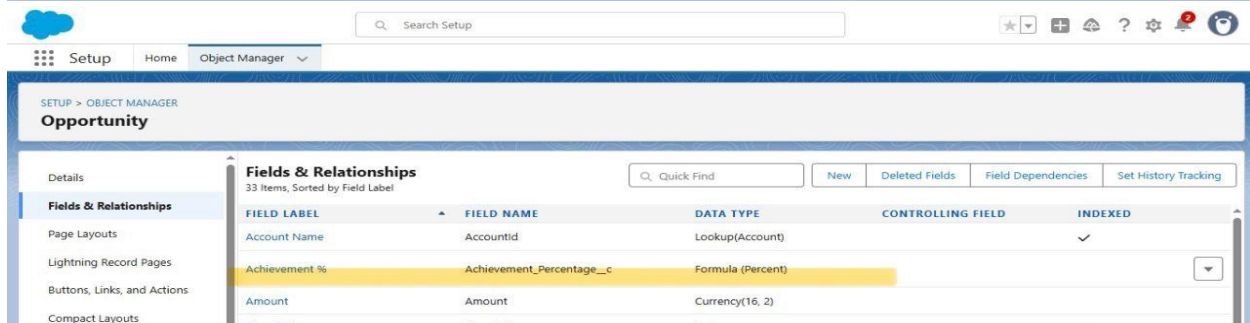   - **Region (Optional)** → To group Accounts and Opportunities by geography.
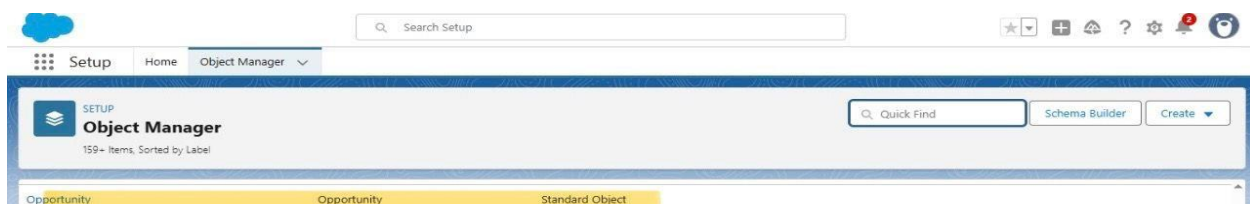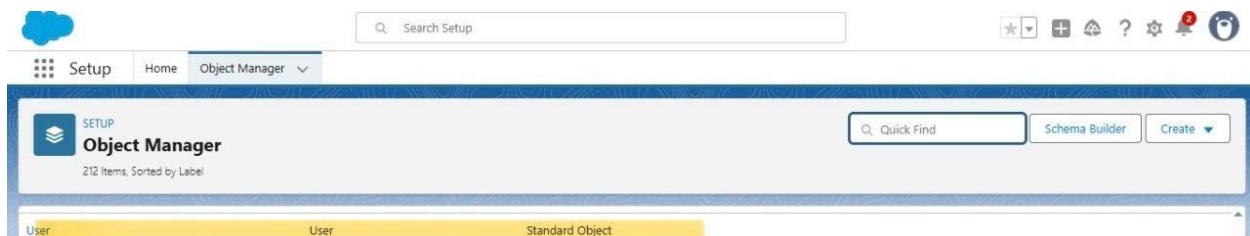
2. Fields

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

FIELD LABEL	FIELD NAME	DATA TYPE		
Price Book	Pricebook2Id	Lookup(Price Book)	✓	
Primary Campaign Source	CampaignId	Lookup(Campaign)	✓	
Private	IsPrivate	Checkbox		
Probability (%)	Probability	Percent(3, 0)		
Quantity	TotalOpportunityQuantity	Number(16, 2)		
Quota	Quota__c	Currency(16, 2)		▼

FIELD LABEL	FIELD NAME	DATA TYPE	
Current Generator(s)	CurrentGenerators__c	Text(100)	▼
Deal Size	Deal_Size__c	Picklist	▼
Delivery/Installation Status	DeliveryInstallationStatus__c	Picklist	▼
Description	Description	Long Text Area(32000)	
Expected Revenue	Expected_Revenue__c	Formula (Currency)	▼

SETUP > OBJECT MANAGER
Sales Target

Fields & Relationships
10 Items, Sorted by Field Label

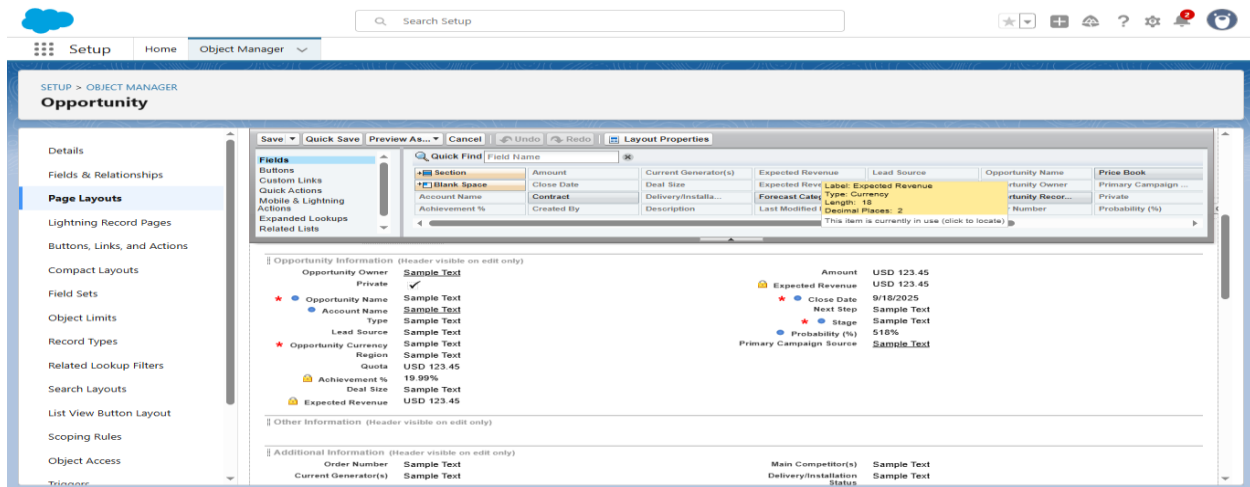| FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED	
Created By	CreatedById	Lookup(User)			
Currency	CurrencyIsoCode	Picklist			▼
Last Modified By	LastModifiedById	Lookup(User)			
Owner	OwnerId	Lookup(User,Group)		✓	
Period	Period__c	Picklist			▼
Quota Value	Quota_Value__c	Currency(16, 2)			▼
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.

Record Types
3 Items, Sorted by Record Type Label

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
New Business		✓	Atharav Dhote, 9/18/2025, 3:49 AM
Renewal		✓	Atharav Dhote, 9/18/2025, 3:50 AM
Upsell		✓	Atharav Dhote, 9/18/2025, 3:51 AM

Sidebar: 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, Scoping Rules, Object Access, Triggers

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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.

5. Compact Layouts

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

6. Schema Builder

Use Schema Builder to visualize object relationships:

- Account → Opportunities (Standard Lookup)
- User → Opportunities (Owner)
- Sales Target → User (Lookup)

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.