

PROJECT MANAGEMENT APP

KULDEEP UPADHYAY

Phase 3: Data Modeling & Relationships

Goal: Build strong data structure with required objects and relationships.

- Identify standard objects (Contacts, Users).
- Create custom objects like Project, Task, Resource Allocation.
- Define key fields: Project Start Date, End Date, Priority, Status.
- Add task-specific fields like Assigned Resource, Deadline, Progress %.
- Create record types for different project types (Agile, Waterfall).
- Design page layouts showing related tasks, resources, and updates.
- Build compact layouts for mobile accessibility.
- Use schema builder to visualize data model and relationships.

Create Master-Detail Field (Object: Timesheet)✕

Field Label

Project Name

Field Name

Project_Name

Description

Help Text

This text displays on detail and edit pages when users hover over the Info icon next to this field.

Related To

Project

Select the other object to which this object is related.

Child Relationship Name

Timesheets

Sharing Setting

Select the minimum access level required on the Master record to create, edit, or delete related Detail records:

☐ Read Only: Allows users with at least Read access to the Master record to create, edit, or delete related Detail records.

☒ Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.

Related List Label

Timesheets

Specify the title that the related list will have in all of the layouts associated with the parent.

Reparentable Master Detail

☐ Child records can be reparented to other parent records after they are created

Save

Cancel

-

Create New Object

Label

Timesheet

Plural Label

Timesheets

Starts With

Consonant

Object Name

Timesheet

Description

Context-Sensitive Help Setting

☒ Open the standard Salesforce.com Help & Training window

☐ Open a window using a Visualforce page

Record Name

Timesheet Name

Data Type

Auto Number

Display Format

{YYYY}-{0}

Example: A-{0000} What Is This?

Starting Number

1

Allow Reports

☒

Allow Activities

☒

Track Field History

☐

In Development

☐ In Development

☒ Deployed

Add Google Docs, Notes, and Attachments related list to default page layout

☐

Save

Cancel

SETUP > OBJECT MANAGER

Project

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

Restriction Rules

Scoping Rules

Object Access

Triggers

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

Fields

Buttons

Quick Actions

Mobile & Lightning Actions

Expanded Lookups

Related Lists

Quick Find

Field Name

Section

End Date

Blank Space

Hours Worked To Date

Account Name

Last Modified By

Created By

opportunity

Project Type

Project Description

Project Name

Start Date

Project Status

Total Hours

Project Detail

Standard Buttons

Edit Delete Clone Change Owner Change Record Type Printable View Edit Labels

Custom Buttons

Information (header visible on edit only)

Project Name Sample Text

Account Name Sample Text

Project Description Sample Text

System Information (header visible on edit only)

Created By Sample Text

Last Modified By Sample Text

Custom Links (header visible on edit only)

Mobile Cards (Salesforce mobile only)

Drag expanded lookups and mobile-enabled Visualforce pages here to display them as mobile cards.

Related Lists

Open Activities

New Task | New Event

Subject	Name	Task	Due Date	Status	Priority	Assigned To
Sample Text	Sample Text	✓	9/25/2025 3:38 AM	Sample Text	Sample Text	Sarah Sameda

Salesforce

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Preview Edit Page Refresh Preview Close

Select a profile: System Administrator

Below is the detail page for the Project Layout page layout and System Administrator profile. The field-level security settings of this profile can hide fields.

Note that profile permissions can alter which fields or buttons are visible for users with certain profiles. Permissions-based changes are not shown in this preview.

Edit Delete Clone

Project Name	Sample Text	Account Name	Sample Text
Project Description	Sample Text	opportunity	Sample Text

▼ Details

Project Type	Fixed Price	Project Status	Not Started
Start Date	9/25/2025		
End Date	9/25/2025		

▼ Hours

Total Hours	865.01
Hours Worked To Date	864.87
Remaining Hours	0.14

▼ Invoicing

Last Month's Timesheet	Last Month's Timesheets	Last Modified By	Sample Text, 9/25/2025, 3:47 AM
Created By	Sample Text, 9/25/2025, 3:47 AM		

Timesheets

New Timesheet

Timesheet Name

GEN-2004-001234

Open Activities

New Task | New Event

Subject	Name	Task	Due Date	Status	Priority	Assigned To
Sample Text		✓	9/25/2025	Not Started	Normal	

Activity History

Log a Call | Mail Merge | Send an Email | View All