

Phase – 3: Data Modeling & Relationships

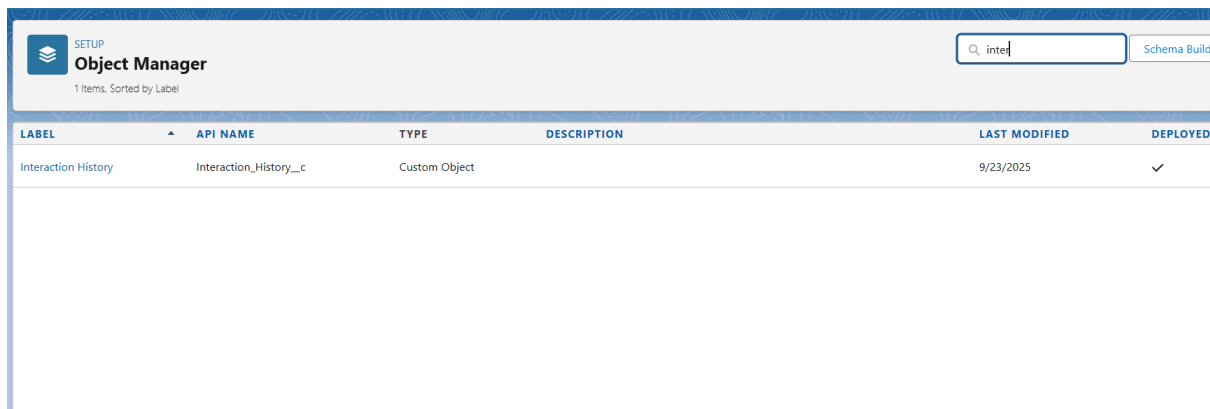
1. Standard & Custom Objects

Standard Objects

- **Account** → stores company/organization details.
- **Contact** → stores individual customer details (linked to Account).

Custom Objects

- **Interaction_History__c** → records calls, meetings, and emails with contacts.
- **(Optional) Contact_Product_Subscription__c** → junction object to track many-to-many relationships between Contacts and Products (if product tracking is included).



The screenshot shows the Salesforce Object Manager interface. At the top, there's a header with the 'Object Manager' logo and a search bar containing 'inter'. Below the header is a table with the following columns: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The table contains one row for the 'Interaction History' object, which is a Custom Object, last modified on 9/23/2025, and is deployed (indicated by a checkmark).

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Interaction History	Interaction_History__c	Custom Object		9/23/2025	✓

2. Fields

Contact (Standard)

- Email (Email)
- Phone (Phone)
- Source (Picklist: Referral, Website, Event, Other)
- Preferred Contact Method (Picklist: Phone, Email, Meeting)

Interaction_History__c (Custom)

- Interaction Type (Picklist: Call, Email, Meeting)
- Date (Date/Time)
- Notes (Long Text Area)
- Outcome (Picklist: Positive, Neutral, Negative)
- Next Follow-Up Date (Date)
- Related Contact (Master-Detail to Contact)

Contact_Product_Subscription__c (Optional Junction)

- Subscription Start Date (Date)
- Subscription Status (Picklist: Active, Inactive, Pending)
- Contact (Master-Detail to Contact)
- Product (Master-Detail to Product)

Setup Home Object Manager

SETUP > OBJECT MANAGER

Interaction History

Details

Fields & Relationships
12 Items, Sorted by Field Label

Q, Quick Find New Deleted Fields Field Dependencies Set History Tracking

Contact	Contact__c	Master-Detail(Contact)	✓	
Created By	CreatedById	Lookup(User)		
Duration (minutes)	Duration_minutes__c	Number(3, 0)		
Interaction Date/Time	Interaction_Date_Time__c	Date/Time		
Interaction History Name	Name	Auto Number	✓	
Interaction Type	Interaction_Type__c	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
Next Follow-Up Date	Next_Follow_Up_Date__c	Date		
Notes	Notes__c	Long Text Area(32000)		
Outcome	Outcome__c	Picklist		
Subject	Subject__c	Text(100)		

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

Setup Home Object Manager

SETUP > OBJECT MANAGER

Interaction History

Details

Fields & Relationships
12 Items, Sorted by Field Label

Q, Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Account Name	Account_Name__c	Formula (Text)		
Contact	Contact__c	Master-Detail(Contact)		✓
Created By	CreatedById	Lookup(User)		
Duration (minutes)	Duration_minutes__c	Number(3, 0)		
Interaction Date/Time	Interaction_Date_Time__c	Date/Time		

Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits

3. Record Types

- **Contact:** Prospect vs Customer (different layouts for each).
- **Interaction History:** Single record type sufficient (Interaction Type field differentiates Calls, Emails, Meetings).

SETUP > OBJECT MANAGER

Interaction History

Details
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Custom Field Definition Detail

Edit
Set Field-Level Security
View Field Accessibility
Where is this used?

Field Information

Field Label	Contact	Object Name	Interaction_History
Field Name	Contact	Data Type	Master-Detail
API Name	Contact__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Konki Mithil	Modified By	Konki Mithil
	9/23/2025, 6:48 AM		9/23/2025, 6:48 AM

Master-Detail Options

Related To	Contact	Child Relationship Name	Interaction_Histories
Related List Label	Interaction Histories		
Sharing Setting	Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.		
Reparentable Master Detail	<input type="checkbox"/>		

Lookup Filter

No lookup filters defined.

Validation Rules

New

Validation Rules Help ?

No validation rules defined.

4. Page Layouts

- **Contact Layout:** Displays contact info, related Account, interaction summary, and related lists.
- **Interaction Layout:** Displays interaction type, date, notes, outcome, follow-up date, and linked contact/account.

SETUP > OBJECT MANAGER

Interaction History

Details
Fields & Relationships
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Page Layouts

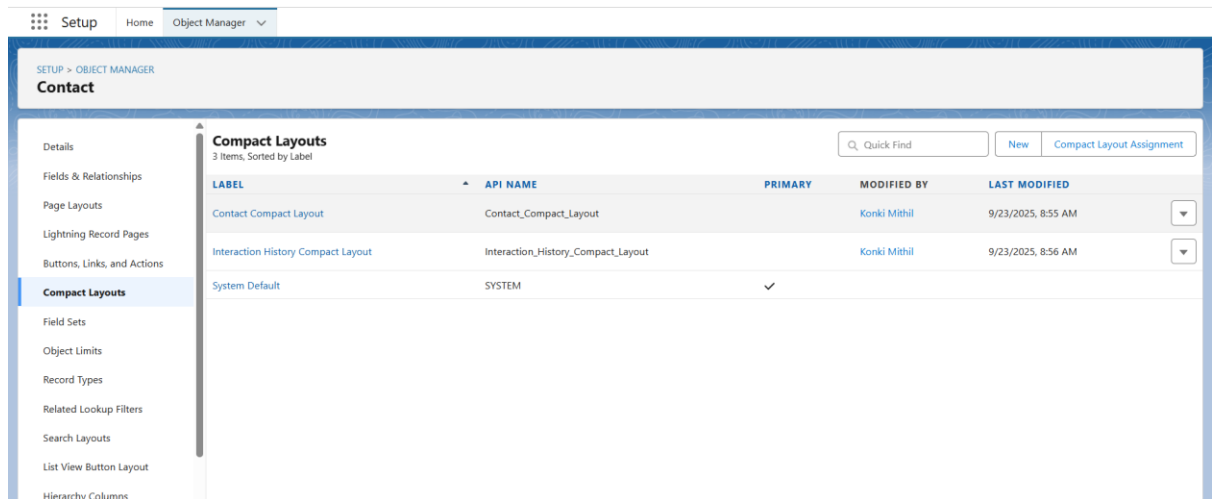
1 Items, Sorted by Page Layout Name

Q Quick Find
New
Page Layout Assignment

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Interaction History Layout	Konki Mithil, 9/23/2025, 6:37 AM	Konki Mithil, 9/23/2025, 6:50 AM

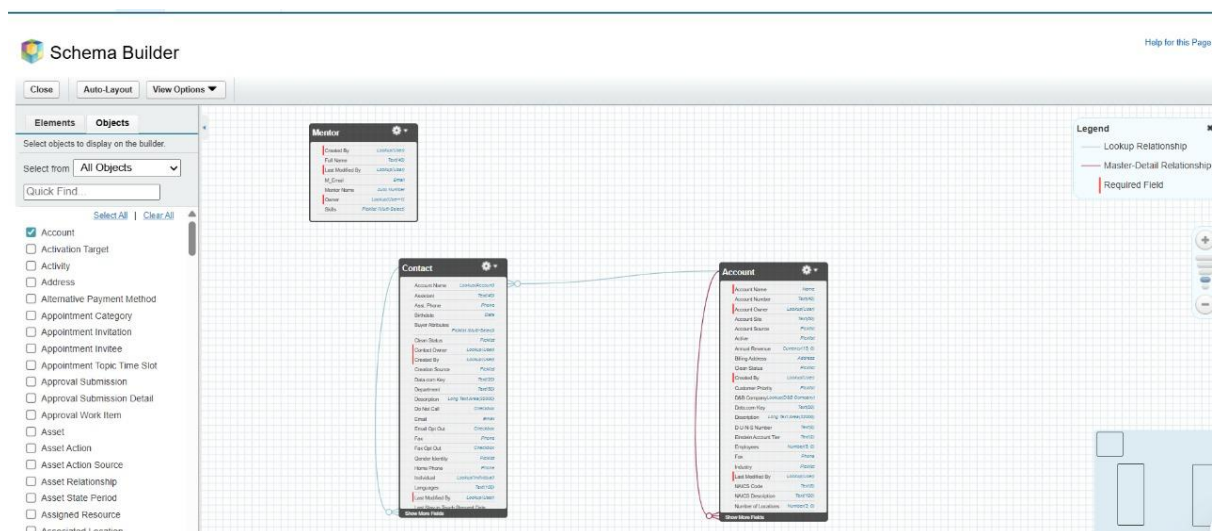
5. Compact Layouts

- **Contact Compact Layout:** Name, Title, Account, Email, Phone.
- **Interaction History Compact Layout:** Interaction Type, Date, Outcome.



6. Schema Builder

- **Account** → **Contact** (standard lookup).
- **Contact** → **Interaction History** (master-detail).
- **Contact** ↔ **Product** (via optional junction object Contact_Product_Subscription).



7. Lookup vs Master-Detail vs Hierarchical Relationships

- **Lookup:** Contact → Account (standard relationship).
- **Master-Detail:** Contact → Interaction History (ensures dependent visibility & roll-ups).
- **Junction:** Contact ↔ Product (if subscriptions are tracked).
- **Hierarchical:** Not applicable (only for User object).

8. Junction Objects (Optional)

- **Contact_Product_Subscription__c** used if Products are in scope.

9. External Objects (Optional)

- Could be used to connect to external ticketing/support systems (via Salesforce Connect).